



Defining Project Success

Whether you're implementing new technology or new processes, changing the way you do business or altering the company culture, there are expectations among your team members, stakeholders and sponsors. But do they share the same expectations?

One of the key roles of a project manager is to understand the expectations of stakeholders, because meeting those expectations means success for the effort.

A few years ago, CC Pace was involved with a project to develop a new reporting system for the chief financial officer (CFO) of a very large lender. It was a relatively small project as these things go, yet a number of circumstances began to slow the process down—primarily due to conflicting priorities within the client company, slowing its ability to make timely decisions and provide input to the process.

Soon the costs began to creep up relative to expectations in the project plan. With the CFO as a key stakeholder, we assumed that toeing the line on the budget was the best approach to follow, so we diverted some attention to other projects, allowing time for the client's decision process to play out—thus conserving budget at the sacrifice of timeline.

A number of those providing input to the process greatly appreciated our consideration, yet when the project concluded a month past schedule but within budget, the CFO was furious. "I would have gladly paid twice as much had you only delivered on time," he admonished us. Only then did we learn that the delay had a ripple effect on other initiatives to which we were not privy.

We learned an important lesson from that project: Always establish the success criteria for your projects before you start, not after you complete the work.

To resolve the potential communication gap as to what expectations must be

met, it is important to get the stakeholders and project team together at the outset to discuss each person's perception of the project objectives and expectations. The conversation that results from such a meeting is extremely valuable to provide a clear understanding across all parties as to what results the project is expected to produce.

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This column focuses on one of Thomsett's tools, the "sliders." Sliders are a series of simple sliding scales depicting seven key factors that contribute to the determination of success for a project: stakeholder satisfaction, meeting objectives, budget, timeline, added value, quality and team satisfaction. Each of these factors is assigned its own slider, which can be set by stakeholders to a position of "fully off," "fully on" or some setting in between, indicating the level of importance of that factor to the project outcome.

It is not uncommon for most stakeholders to prefer to have every slider in the "on" position when the discussion

SLIDER 1: Level of Stakeholder Satisfaction

Obviously the project needs to yield results to satisfy the stakeholders, but some stakeholders may have critical needs and are impacted directly, while for others the effects are less obvious or they may even be adversely affected. Changes to some aspect of technical infrastructure, for example, may have limited obvious importance to operational stakeholders even when they are critical to long-term maintenance of core systems.

SLIDER 2: Meeting of Objectives and Requirements

This slider helps to bring perspective to the degree to which the requirements must be met by this project. Is it important to put all the requirements into the application under development? Or can



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the wish-list items and lower-level priority items be excluded from the end result?

SLIDER 3: Meeting Budget

This slider helps to measure the importance of the budget to the project. If there is a fixed budget that cannot be adjusted, then the slider needs to be in the fully “on” position. If there is some flexibility in terms of budget or the focus is not solely on the dollars, then the slider can be placed somewhere in between the “on” and “off” positions.

SLIDER 4: Meeting Deadlines

In cases where there is a set time frame for when a project must be completed (e.g., to meet regulatory requirements), this slider would need to be in the fully “on” position. But in other cases, there might be flexibility, and the slider can be moved to a different position based on the stakeholder requirements.

SLIDER 5: Added-Value Requirements

This slider measures the importance of any added value to the organization the effort will produce. If the project involves technology replacement due to retirement of vendor support, the slider will be in a low position. In another project, the purpose of the new technology may be specifically to increase efficiencies to reduce overhead and gain almost immediate return on investment (ROI), in which case the slider will be in the “on” position.

SLIDER 6: Quality Requirements

The level of quality is often reflected by the amount of time spent testing and validating the project results. If the project created a customer-facing application, this slider would be near or fully in the “on” position, indicating the need for a clean release with close to zero or no defects. If this were a back-office application with sufficient resources to address any short-term defects, then the slider may be placed elsewhere.

SLIDER 7: Team Satisfaction

The culture of an organization has a lot of influence on the team-satisfaction slider. This factor addresses the team and how far the stakeholders are willing to push in order to reach their project objectives. If the

organization focuses on quality of life for its employees, the slider will be somewhere in the middle; if the organization is willing to sacrifice the team’s short-term happiness for a successful project, then it will slide toward the “off” position. In an organization that treats its employees above its customers to ensure some level of job satisfaction, then that slider would be set to “on.”

These sliders should not be considered and set independently of one another; rather, the settings should represent a balance. At times concessions must be made with one slider if another is more important. If time is the most important factor, then perhaps the budget slider will slide closer to “off” to allow for additional resources to be brought in, if needed, to meet the deadline.

If quality is the most important factor, then more time might be needed for additional testing to ensure no defects are delivered. Or perhaps budget for extra resources might be needed, or perhaps a reduction in the requirements to reduce the testing scope might be in order. If the stakeholder expectations are paramount, then clear definition of those objectives are required, with the project manager then facilitating the discussion to ensure the timeline, budget and other sliders are all in realistic positions to meet those expectations.

The sliders tool is intended as a living document to be referenced and updated throughout the project. Once a time crunch or other issue is experienced, the stakeholders must be consulted to determine which factors are flexible and can be adjusted so that progress may continue for the project. The output from this process provides guidelines under which the project manager and his or her team can proceed, ensuring the focus remains on the project parameters that are most important.

Debbie Shatz is a director with CC Pace’s mortgage consulting practice in Fairfax, Virginia. She can be reached at dshatz@ccpace.com. Craig Hughes, managing director of CC Pace’s mortgage consulting practice, contributed to this column. He can be reached at chughes@ccpace.com. CC Pace is a financial services consulting firm that custom-designs solutions to achieve both measurable bottom-line results and significantly improved business processes for clients. For more information, visit www.ccpace.com.