



10 Keys for Project Success

Projects represent a company's attempt to establish competitive advantage and profit improvement. Successful projects separate companies from those struggling to compete. Use these ten steps as a guideline to insure project success and take your company to new heights.

1. Set Expectations: Define the Project

Too often, projects fail because executives, stakeholders and the project team did not agree on what the project was supposed to accomplish and each measured the project differently. If everyone involved can agree on the end goals and major deliverables, the project has a much greater chance of being viewed as a success at project conclusion.

Begin project definition by thoroughly understanding the current state. Set the stage by documenting the current processes and tools used. Collect the documented processes established by management as well as the unique application of the published guidelines by each business area. The objective is to understand not just the current tools and processes, but also the business goals targeted by the current approaches. This step ensures the team is aware of current functionality so users do not experience a loss of function with the new process or toolset.

Collect stakeholder and executive requirements for the future vision. Document the desired processes, tools and timing required. Users often view the opportunity to state their vision as a chance to "ask for the moon." It is important to challenge and clarify statements and to move from stated to real requirements.

Compare the requirements collected to the current processes and tools to identify the changes required to reach the vision. This gap analysis helps to identify the unique needs of each business area and lets the project achieve best practices across the enterprise.

Make sure the change initiative is both process and toolset. Too many projects become a technology initiative when new solutions are purchased and implemented. Make sure the investment in technology offers the most direct and efficient path to success and is not just speeding up the same poor decisions and processes of the past.

Collect success measures. What Key Performance Indicators (KPIs) signal project success? Understanding these measures helps the team focus on the truly important tasks and helps guide project planning.

Armed with this information, establish the project scope with specific expectations for success. Be clear on critical dates for key deliverables. If the gap analysis identifies a great deal of change and effort to reach the end vision, use a phased delivery approach. Creating several phases to a project enables the team to avoid over design. Multiple short projects increases speed to benefit by delivering incremental gains as they are available and does not require the project to wait for the entire vision to be completed for delivery.

Validate the current state, project requirements and scope with the stakeholders. Gain signoff from executives and key users on these key documents to establish clear boundaries and goals for the project team.



2. Get Organized: Create the Project Plan

With a clear vision and understanding of what must be done, it is now time to create the project plan. This provides the roadmap for project activities and identifies if the project is ahead of or behind schedule.

Break the project effort into workable portions. Often the tasks identified require several weeks or months to accomplish. Create tasks that are between a half day and five days in length. Defining tasks as smaller efforts enables the project team to more easily understand when a task is complete, assign responsibility for each task to fewer resources and provides more opportunities to celebrate success along the way.

Don't forget about administrative efforts. Tasks such as "Schedule the meeting" or "Recap findings" may seem trivial, but they may take several days to accomplish. Ignoring these steps unnecessarily introduces a chance to miss milestones in the plan.

Assign realistic time estimates to these tasks. Refer to past project plans or functional experts to generate accurate estimates to complete the work. Avoid the temptation to pad estimates with unnecessary time. Because of contingencies between tasks and meeting planning, consistently completing tasks ahead of schedule can create almost as many problems as being consistently late with task completion.

Incorporate hard dates and contingencies into the plan. If specific deadlines or meeting dates are provided during the requirements collection step, be sure to include them in the project plan. Achieving the goals set out by the stakeholders increases a sense of ownership in project success and eases the change management effort. Accurately associating one task with another (for example, software cannot be installed until the machine is purchased and operational) allows for more accurate tracking of completion status and project delays are attributed to the actual cause for swifter resolution.

During project planning, focus on implementation and rollout. While it may be easy for the project team to focus on their efforts required to complete the project, the real reason for initiating the project is to improve end user behavior and results. Incorporate sufficient training, documentation and work time to ensure that project team efforts are accepted and utilized by the ultimate consumer of the project deliverables.

As the project gets underway, keep a close eye on those tasks that have the greatest impact on completing on time and watch the critical path. It identifies tasks that must be completed on time for the whole project to be completed on schedule. Analysis of the critical path helps to calculate the minimum length of time in which the project can be completed, and which activities should be prioritized to complete by that date.

Track and communicate project status weekly. Gains or delays in task completion timing impact other work efforts down the road. Update task completion percentages and future date changes to keep the project team and stakeholders informed. As the project progresses and tasks are completed on schedule or late, decisions on project scope may be needed or future task timing may be impacted. Identify and address these issues as early as possible to keep the project running smoothly.



3. Start at the Top: Gain Executive Support

Somebody at the executive level has approved the project to initiate the effort in the first place, but does the team truly have full support? The key is to gain support early on and make sure it does not stop at project meetings and extends to decisions that impact project scope and resources. Identify executive support necessary for project success. Look for two types of executives in this step: Top Level Executives and User Executives.

Top Level Executive support drives User Executive support and can motivate entire user community through involvement in project communication, kick-off meetings and rollout meetings. They also approve budgets and ensure the project team acquires the necessary tools, training and resources for the project to succeed. Without their support, the project team may not be able to get the computers, office space, software, server processing time or IT assistance during the project effort.

User Executives are team leaders for the impacted user groups. Their support is critical to improve the chances for success of the change management effort. Without executive support from the user community, project success is at risk and user involvement in testing, training and rollout activities will be inconsistent.

4. The Best Teams Deliver the Best Results: Project Team Management

Successful projects have well staffed project teams working together. The project scope document shows the functional areas impacted by the project and project plan creation has identified the steps required and the skill sets needed to complete the effort. Executive support increases the chances of top performers being made available for project efforts.

Select the most talented people for the project team. Knowledge of existing company processes and tools makes internal candidates excellent team members. In addition, internal team members become project champions and change agents ensuring continued project success once completed. Be sure to help manage re-entry into the workplace for internal resources so their involvement does not negatively impact their career path. This helps to ensure a strong internal resource pool for future projects.

External resources are also a great addition to the project team and can focus 100% on the project at hand and are not required to juggle other responsibilities. They are often well-versed in project management and team dynamics. A very specific skill-set and expertise can be targeted externally that may not be available in the internal resource pool.

Depending on the size, duration and complexity of the project, adding a full-time project manager may be warranted. The unencumbered focus on the project plan and deliverables helps to minimize the impact of competing priorities, improves the quality of project results and often benefits team chemistry.

Once the team member selection has been approved, building a strong working relationship is the next priority. Building a team identity and sense of purpose helps the group perform at a higher level and improve the quality of work. This can take time, although facilitation by an experienced project manager can speed the process.



In addition to guiding the team through the process of Form, Norm, Storm and Perform, keeping team morale high throughout the course of the project should be a focus of the project manager. Even a small budget for team lunches or after-work activities can go a long way toward getting maximum effort and production from the team.

During instances when teammates disagree on key decisions, conflict resolution is critical. Keep the project team focused on the end-user and project scope document. Remove personal issues and feelings and keep the focus on the task at hand.

Priority management can also be an issue with project teams, especially those heavily staffed with internal resources. Unless the team member has been completely removed from their other job responsibilities, it can be difficult to manage both project tasks and outside pressures. Keep internal teammates focused by temporarily changing their reporting structure to ensure commitment to the project team, tasks and success. When this is not possible, partnership with user executives is critical.

Meeting management is another key for project success. Involve those outside the direct project team only when necessary. Executives, users and IT resource involvement should follow a 'confirm and critique' approach instead of asking them to create content from scratch. Because of other responsibilities outside of the project, don't assume participant from outside of the project team will work on project tasks outside of set meeting times. Build time into meetings to read documents and brainstorm feedback. Incorrectly assuming those tasks will be completed by all participants prior to the actual meeting will compromise the meeting agenda and require those who did complete the work to sit through a review for those who did not.



5. Prepare for the Inevitable: Risk Management

Risk management is a clear focus on the identification of risk and the reduction in probability and impact of that risk. Begin by brainstorming the business, legal, technical and organizational risks to the project early in the process. Build time into the project plan for this effort. Involve functional experts from the business, legal and technical areas to identify as many potential risks as possible.

In addition to identifying the risks themselves, identify triggers that may increase the probability of the risk happening. These triggers are early indicators of risk occurrence and can help the project team mitigate the impact of the risk on project success. During brainstorming meetings, also gather risk symptoms to assist in the early identification of risk occurrence.

Classify each of the potential risks with an impact rating and probability of occurrence. Every risk does not have the same impact. Probability of risk occurrence can be listed as low, medium or high. Based on past projects and company acceptance of change efforts, this probability rating can help focus the project team on more likely issues.

Create contingency plans for high impact or high probability risks. These risks can have the largest impact on the bottom line and have a good chance of becoming real issues. Create plans with tasks, timing and probable resource assignments that can be quickly put into action if the risk situation is identified.



6. Stick to the Plan: Scope Management

Now that a plan and the team are in place, it is important to stay focused. Keep the end goal in mind and practice scope management throughout the life of the project.

Once a project is underway and existing processes and tools are being examined, users often see an opportunity to accomplish alternate agendas. While it is tempting to fix additional issues identified and further improve processes and tools, do not let these temptations impact the success of the original project as defined by the project scope. Establish and strictly keep to a scope change process.

All changes to scope should require project team approval. This includes additions and deletions from the task list. It is tempting to address issues outside of scope as they are identified. However, because the project plan is often a tightly woven web of interdependent tasks involving several people, coordination of any change is required. Regular project team meetings provide a forum for minor changes to the project effort. If the team can agree that the gains from the change do not impact the overall scope and timing of the central effort than the change is a positive one that can be added.

Changes to approved deliverables or dates require project team, stakeholder and executive approval. If the agreement with the stakeholders and executives documented in the scope document is in jeopardy, it is the responsibility of the project team to present these suggested changes and gain consensus before deciding to act. Because the scope document should be viewed as the project charter and the reason for project team formation in the first place, suggested changes to this document must be treated with the utmost respect.

Many excellent suggestions for change and project work emerge once the project team begins its efforts. For those suggested scope changes that are not approved by either the project team or the stakeholders and executives, document them for future phases. While adding them to the existing project plan may jeopardize success for the current project, they may be valuable insights and suggestions that will provide benefit for future project phases and work.



7. Deliver on the Plan: Quality Assurance

With all of the time and effort that has gone into building and preserving the project plan, it is all the more important to meet the requirements established. A solid quality assurance plan and approach ensures that the project deliverables fulfill the requirements voiced by the stakeholders.

“On Time, On Budget or a Quality Result – you can have any two.” It is a dilemma that does not need to be a project reality. With proper planning and sound quality assurance techniques, the best run projects should expect quality deliverables on-time and on-budget.

If available, involve the Quality Assurance (QA) team early in the planning and risk management stages. Schedule reviews and audits throughout the project to identify quality issues earlier in the timeline so fixes can be created as part of the normal operations so project quality and timing do not suffer.



Create functional design documents to guide the work and provide a measurement guideline for success. These Functional Requirements Specifications (FRS) spell out the user requirements in great detail and provide a blueprint for the project team. The best FRS templates focus on the business goal of the change, provide scenarios explaining how real-world business events would interact with the change and document the effort in sufficient detail to drive the work. The FRS should also list all project assumptions made, so when stakeholder signoff is achieved there are no surprises.

The FRS now represents the agreed upon user requirements in a clearly documented format. Once an FRS has gained stakeholder signoff, technical requirements and the corresponding technical specifications can be created that will support the functional requirements. QA teammates can now use the FRS to create test scenarios to test the new deliverables and processes for accuracy.

When creating the test scenarios, use business data that represents real-world examples. Once the final project deliverable passes these test scenarios, the business users and stakeholders should have confidence that the project has delivered on its promise, improves business results and fulfills project requirements.

When deciding if the project deliverable passes a test scenario, the pass or fail determination is not always a black and white decision. The QA team should pre-determine what results will determine a passing grade. These quality tolerance levels help the team keep in mind that the final product doesn't have to be perfect, it just needs to be good enough to fulfill the business needs and meet project requirements.

Quality is defined by both the technical and business recipients of the deliverable. The users should be interviewed to understand their needs and these requirements are the drivers of the quality process.

Complete business and technical testing prior to pilot. Internal testing of the deliverable by the project team and QA department minimizes distractions to the end users while still delivering on the project scope.

Once the project is complete, close the project with client satisfaction survey. Gain an understanding of how the project was perceived from the user point-of-view. Knowledge of how the project deliverables met user requirements, quality of project team communication and an indication of good user time management helps the project team do a better job on future efforts. Compile and distribute lessons learned to the project team and sponsors to validate the effort. This type of closure document is also a useful tool for determining team rewards.



8. Spread the News: Communicate Early and Often

Build a communication plan as part of initial project planning. With the input of the entire project team, determine the messages to communicate, the recipients of those messages, the teammates responsible for crafting the message, the media used to send those messages and the timing of message delivery.

Pick the right audience for each message. The same message may be received very differently by each group. While the message may stay the same, changing the communication vehicle or timing helps to personalize the message and enables each recipient to receive and process the message content in their own way.

Sharing the project overview, benefits and timeline prepares the user community for the upcoming change. This communication should come at the beginning of the project so barriers for change success are identified early and the project team has the entire project duration to address these challenges.



Project status updates provided weekly keeps the project on schedule and stakeholders in the loop. There will likely be small changes in scope and timing as efforts progress. The sense of ownership for those outside of the immediate project team grows with the level of information shared.

Publication of project success rewards and motivates both the project team and user community. Project team members will likely value recognition of their efforts along the way. However, understand the unique motivators for each project team member. Some people find public recognition to be unpleasant and this type of communication may be counter-productive. Early user success, such as gains made by the pilot group, can be a useful tool to motivate the larger user population during rollout.

When building the communication plan be aware of the other responsibilities of the recipients. Don't be guilty of "communication overkill" or you will lose stakeholder interest. Too much communication may irritate the audience and cause them to stop attending meetings or ignore future messages. Communication must be concise and timely to keep stakeholder interest and participation levels high.



9. Gain User Acceptance: Change Management

The communication plan is just one piece of the overall change management effort. The challenge of changing human behavior is often the biggest obstacle to overcome when working to achieve project success.

The primary goal of many projects is consistent use of best practices. While creation of new tools supporting the best practices may represent a significant portion of the project effort, changing user behavior to follow the best practices and use the new tools should be the end goal.

To successfully change long-term behavior, the project team needs to move end users from one comfort zone to another. When people become comfortable with a process and toolset, they become locked in their ways. It takes a well-formulated change management effort to break them out of the current way of doing things. Only once the affected user base has been taken out of their comfort zone are they ready to accept a new way of doing things.

The first step in a successful change management effort is to identify all stakeholders involved in the change. Leaving out even a small group of those impacted by the change can have a ripple effect throughout the organization. Show all stakeholders what's in it for them. People are driven by achieving their goals. Show those impacted by the upcoming change how their jobs will be better after the change. If the team cannot show somebody how the proposed change will benefit them, they will be incited to oppose the change effort. Effecting change is difficult – implementing change without benefit is almost impossible.

When rolling out the new tools and processes, test the new approach with a pilot to learn issues and fix them prior to rollout. Even the best plans will have gaps not realized until the project encounters real business issues. Apply the change to a small group of users in a controlled environment and pay special attention to the actual results realized. While this approach may add a few weeks to the realization of the company-wide benefits, the last-minute opportunity to fine tune the change or avoid far-reaching mistakes should not be bypassed and lost.



Don't skimp on the time and resources allocated to train the users on the new tool and process. Plan time in the classroom to demonstrate how the new tools and processes should be used with real business examples. Create documentation on the new process and toolset, including cheat sheets that are easy to use and understand. Cheat sheets help the user community integrate the new approach into their workday while the rest of the documentation preserves the knowledge capital of the project team once the project is complete and the team has been disbanded.

Insure the change perseveres by setting clear and achievable deadlines with multiple progress checkpoints. Along the way, support users with working sessions where the project team can provide process and tool expertise while the user group applies the new approach to their business. The structured work time insures focus on the change effort when other responsibilities could distract them.

Measure compliance by tracking use of the new tools and processes. Some projects insert new approval forms or easily tracked system steps to identify which users or business areas are more quickly applying the new approach and those who are slower to adopt the change. Use these measures to communicate, celebrate and reward success.



10. Quantify Results: Measure Project Success

From the early project planning efforts and scope document creation, the team has identified Key Performance Indicators (KPI) that demonstrate project success. These measures should be gathered across all impacted areas prior to the implementation of the change to establish a pre-project baseline. In addition, the team should measure these KPIs along the way to track progress, motivate users to change their behavior and insure the project is keeping on schedule.

Once the change has been rolled out to the entire company and the impact of the change can be measured, collect post-project values to calculate the benefit of the project. Most projects require a business case to justify the time and expense of the project. Comparison of the KPI baseline with those measures gathered after project completion gives a good indicator of the project's overall impact. Comparing these gains to the anticipated benefits helps the project team do a better job of estimating benefits for future project efforts.

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