LAYMAN & LAYMAN

Measurement Problems that Plague Us

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12th Annual PSM Users Conference
July 18, 2008
Mystic, Connecticut

Premise

LAYMAN & LAYMAN

- Same measurement problems keep afflicting us
  - Time Reporting
  - Resource Management
  - Project Status

- Problem is <u>not</u> technology or maturity
- Problems caused by lack of:
  - Good measurement design
  - Supporting process, clear roles, & infrastructure
  - Organizational change management

Time Reporting

Gene, don't forget to approve my timesheeeeet!

- Time Reporting Systems are:
  - not enforced
  - difficult to use
  - too tied to financial systems – billable, OT, other
  - not designed to fit (don't collect right attributes)
  - not comprehensive - contractors, managers, etc.
- Data is often misused or not used
  - Dirty Data
  - Poor analyses
- No effort data…no baselining, benchmarking, productivity, project tracking, estimation improvements…no nothin'![3]

Cultural Problems

- Waste of time; non-value added
- Fear of exposure
  - "I decide what I'll spend time on – I'm a professional"
- Fear of telling the "real story"
  - "But then the management team will actually know whether we are on budget or not…"
- Fear of dis-empowerment
  - Managers/PI team/HQ will micromanage, when they should be looking at higher levels of abstraction for trends and corrective action
  - Being surprised when someone else reports on your data
- Fear of misunderstanding
  - Data will be interpreted by someone without understanding the context or "whole story" (Measurement team, upper management, etc.)
  - "Of course I #)@(take longer than Ted – his stuff never works"
- Fear of measuring people, not process
  - People have been "burned" in the past and don't believe this will be different
  - Fears include: use to compare, reward/not, fire/outsource

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WIFM = Information Needs

- The CIO needs to understand actual project performance (productivity rates) in order to avoid over-committing and to match workforce capacity with workload.
- The Project Manager needs to understand effort required to complete project activities in order to adjust task assignments.
- The Project Office/EPG needs to understand effort required to complete project activities in order to calibrate and improve estimation and planning models.
  - Effort profiles of past projects to validate current project estimates.

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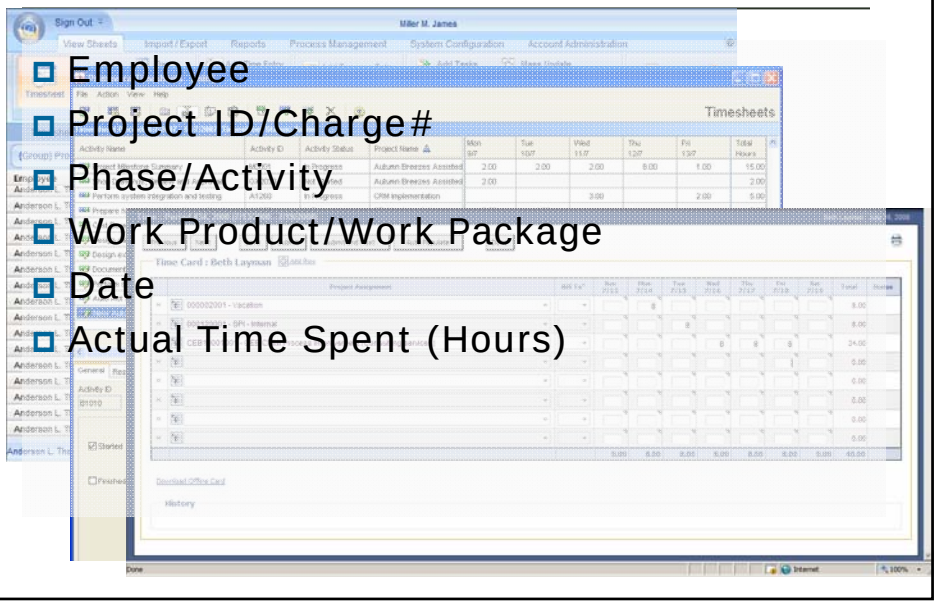
Time Reporting – The Solution



- Employee
- Project ID/Charge#
- Phase/Activity
- Work Product/Work Package
- Date
- Actual Time Spent (Hours)

Time Reporting – Institutionalizing it

- WIFM Selling
- Need central function to coordinate & support (PMO)
  - Need someone to write the queries, exports, glue code
  - For purchased or hosted solutions, still need:
    - Development of internal tool SMEs
    - Training/roll-out
    - Process/tool integration
  - Home-grown systems require support like any other tool
- Time System KPIs
  - Late submittals
  - Late approvals
  - # rejections
- TimeSheet and Process Audits
- Demand-Pull
  - Show PMs how to use it to sanity check weekly
  - Let PMs analyze and report on it
  - Have managers looking at KPIs & data (over the long-term)

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Resource Management

Drowning in the Project Resource Pool, Dick Billows

- Today's solutions require cross-functional teams
- Too much work and not enough resources
- Conflicts for key people's time
- People guess at what's most critical
- Some resources are burned out – attrition and sickness is high
- No visibility into resource overload/conflicts
- No single source of truth for commitments

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Resource Mgt - Context

Production Work

- Ops & Client Support
- Ongoing
- Functional Management
- Follows SOP/std process
- Goal: efficient support

vs

Project Work

- Varied
- Begins and Ends
- Project Management
- Follows project plan
- Goal: successful change

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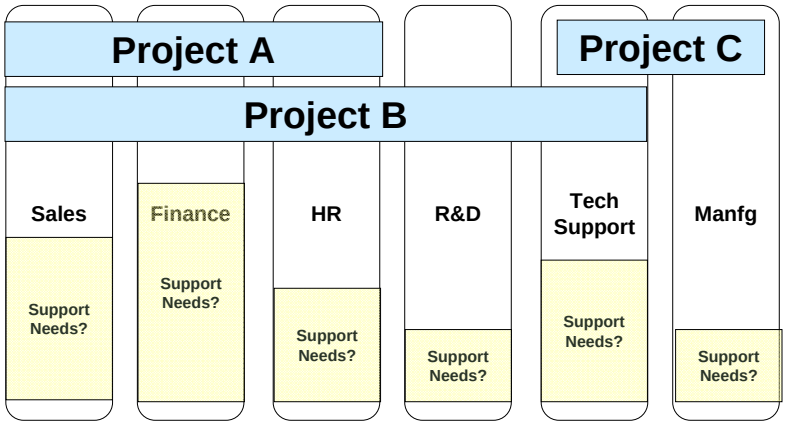
The Messy Matrix



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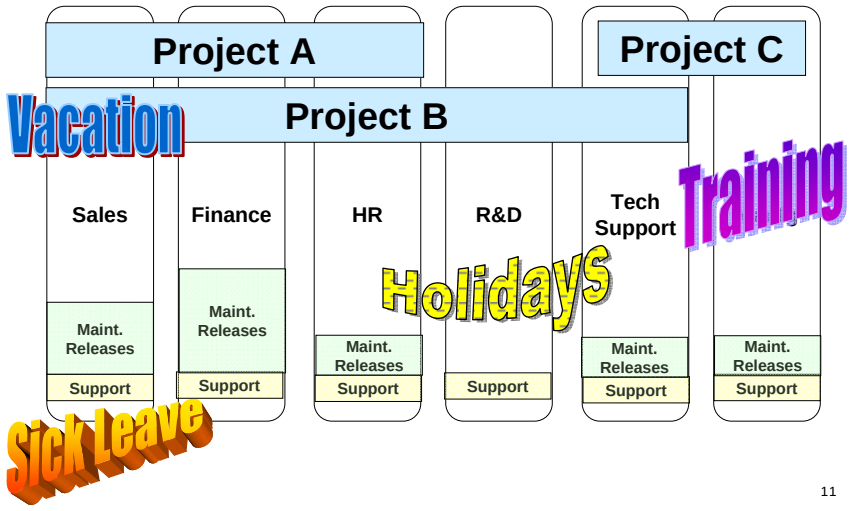

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Resource Mgt – The Solution

1. Build the Operating Plan (Portfolio Mgt)
   - Align the work to business goals/objectives
   - Prioritize what work to do – the cut line
   - Allocate Resources and timelines to "above the line work"
2. Build/Update the Resource Pool
3. Launch project(s); deploy resources
4. Monitor resource plans vs. actual
   - Which, BTW, requires good time reporting!
5. Adjust project plans
6. Adjust the Resource Pool
7. Adjust Operating Plan

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Resource Mgt – Example

IT Market Management Staff allocation spreadsheet
Document owner: Abhinav Katoch
Legend > 100% and <=125%
>125%

Team	Name	Project			April Planned	April Actual
Apps Dev	Hitesth Dev			**Total**	30%	100%
Apps Dev	Sameer Kumar			**Total**	135%	55%
Apps Dev	Sandhya Vetcha	PMO	Kal Challa	Duplicate Institution Cleansing-Project Manager	25%	13%
BI	Em Krueger	PMO	Kal Challa	Timetracking-Project Manager		
BI	Harish Shankar	PMO	Kal Challa	PTO - Maternity leave		
BI	Joey Selim	PMO	Kal Challa	CRM/ BI Requirements Documentation (current state)		
BI	Kirit Anjaria	PMO	Kal Challa	Project Lifecycles PAT tasks		
BI	Manav Patel	PMO	Kal Challa	Tech. Delivery, Process Improvement (CMMI	20%	10%
BI	Teshaye Asrat	PMO	Kal Challa	CRM RTE Release | Delphi upgrade		
CRM	Dave McCarey	PMO	Kal Challa	CRM RTE Release | Delph user in-activation and new user acce	60%	76%
CRM	May Yang	PMO	Kal Challa	Wait for Vendor Responses / Complete Demos		
CRM	Mike Driscoll	PMO	Kal Challa	Document requirements		
CRM	Nagendra	PMO	Kal Challa	Develop Scoring / Develop ROI		
CRM	Samir Singh	PMO	Kal Challa	Select CRM Platform / Document Selection Reasons		
DQ	Akbar Naqvi	PMO	Kal Challa	Admin		5%
		PMO	Kal Challa	**Total**	105%	104%
Managemen	Mohamed Elansary			**Total**	126%	173%
Managemen	Price Jett			**Total**	135%	113%
PMO	Abhinav Katoch			**Total**	110%	128%
PMO	Kal Challa			**Total**	105%	104%

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Resource Mgt – Example

Project: CRM RTE 2008 Release

Project Team Member (IT Employee Allocations from IT Resource Plan)

	Kal Challa	Mark Freed	Samir Kumaar	Eric Coffey	<Name>	<Name>	<Name>
% of time allocated (by month)	60%	10%	25%	25%			
	60%	10%	25%	25%			
	60%	50%	25%	25%			
	60%	50%	25%	25%			
	60%	50%	25%	0%			
	50%	50%	25%	0%			
	50%	50%	25%	0%			
	25%	50%	25%	0%			

	Effort (Hours)							
Project Schedule	Planned Effort Allocation	Actual Effort Spent	Approximate % Complete	Baseline	Cum Planned Effort	Cum Actual Effort Spent	"Earned Value"	Effort Variance
Jan'08	176	85	5%	1000	**176**	**85**	**69**	**52%**
Feb'08	176	210	15%	1000	**353**	**295**	**208**	**16%**
Mar'08	235	220	30%	1000	**588**	**515**	**417**	**12%**
Apr'08	235	214	50%	1000	**823**	**729**	**695**	**11%**
May'08	198			1000	**1,022**	**#N/A**	**#N/A**	**#N/A**
Jun'08	184			1000	**1,205**	**#N/A**	**#N/A**	**#N/A**
Jul'08	184			1000	**1,389**	**#N/A**	**#N/A**	**#N/A**
Aug'08				1000	**#N/A**	**#N/A**	**#N/A**	**#N/A**
Sep'08				1000	**#N/A**	**#N/A**	**#N/A**	**#N/A**
Oct'08				1000	**#N/A**	**#N/A**	**#N/A**	**#N/A**
Nov'08				1000	**#N/A**	**#N/A**	**#N/A**	**#N/A**
Dec'08				1000	**#N/A**	**#N/A**	**#N/A**	**#N/A**
	1,389	**Plan Total**						

Resource Mgt – Institutionalizing it

- PMO-like Coordination & Support (again)
- Need portfolio and project governance (clear roles & decision authority)
- Need Demand-Pull
  - Show it to everyone – give everyone read access
  - Ask functional mgrs to analyze and report on it
    - Have execs looking at it (over the long-term)
  - Evolve to thresholds/KPIs

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Project Status Reporting

- Execs and Project stakeholders need to be informed of status
- Project reporting isn't:
  - consistent across projects
  - quantitative
  - objective
  - informative
  - used
- Project reporting is:
  - Time consuming
  - Too much cut-and-paste

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Status Reporting – The Solution

- Simple project workbook that lives in a collaborative workspace
  - Allow variations for different projects
    - Size/Reqs might be stories, RTM lines, CRs
    - Key milestones match life cycle (maint, dev, release, iterative)
- Project status (qualitative) + dashboard (quantitative)
  - Presented dynamically at mgt & project steering reviews
- Data can be supplied by various sources
- Data can be mined for organizational measurement purposes

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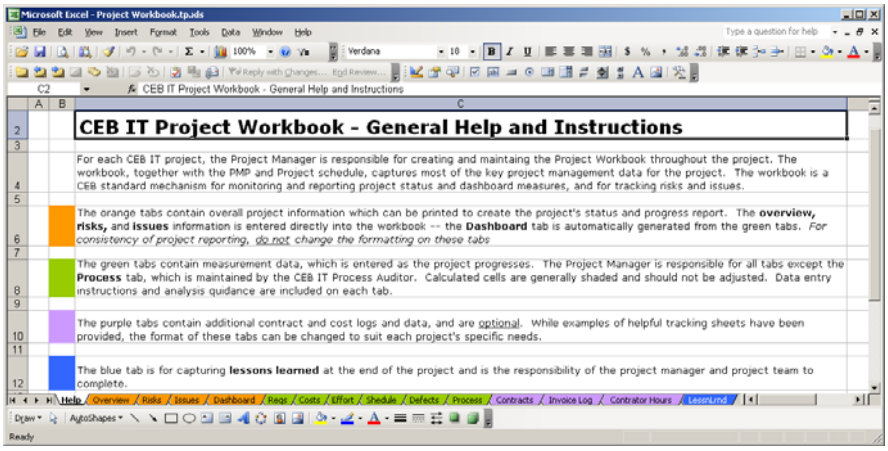
Status Reporting – Example



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Status Reporting – Institutionalizing it

- Make it interactive vs. email
- Build into existing meeting forums
- Workbook and Process Audits
- Create Demand-Pull
  - Work with management to:
    - adopt the "right" posture (don't dis-empower)
    - ask the "right" questions during the reviews (individual chart and integrated analysis guidance)

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What Helps

- Project Management Offices
  - Providing infrastructure to support measurement
- Portfolio and Project Mgt Processes
  - Integrating Process and Measurement
  - Building in Demand-Pull
- Process Audits/Checks
- Rewards
- Organizational Change Mgt Focus
  - Burning Platform
  - Leadership Alignment and Participation (see next)

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Example-Helping Mgrs Lead…

- What are your main responsibilities? (There are 4 of them)
  1. DRIVE PI PLANS
     - create vision and desire for change
     - approve all PI strategies, plans, roadmaps
     - …including Measurement & Training Plan development and execution
  2. COMMUNICATE regularly about PI program to your teams
     - tie business objectives of the organization to PI program
     - review plans, scope, upcoming events, expectations
  3. Provide CONSEQUENCES for "not doing" it
     - ENFORCE compliance
     - tie to CDP/annual reviews
  4. MONITOR & CONTROL PI Program progress
     - treat it like any other project
     - remove roadblocks

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THANK YOU!

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