

PM WORLD TODAY – CASE STUDY SERIES – FEBRUARY 2008
Program and Project Retrospectives:
Achieving organizational buy-in

(Part 2 of a Series)

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Editor's note: While the paper below may not meet the academic definition of a case study, it is based on the experiences of the authors at Intel Corporation in the USA. We feel that this series comfortably fits in the case studies category of PM World Today better than in other sections.

Okay, you have read the [first paper](#) in this series and have decided to try using the retrospectives method for capturing key learnings within your organization. However, other post-project audit methods are used within your organization, and many teams feel that they are completely adequate. Because of this, you know that you will encounter resistance to change to a new methodology. How do you proceed?

Although there are many ways to introduce change into an organization, having a defined approach and plan is fundamental in order to overcome resistance to change and to gain senior stakeholder buy-in. This paper describes the approach that was used for introducing the retrospectives methodology into Intel, as well as the factors that were beneficial in gaining organizational buy-in for broad deployment.

Start with a Problem, Not a Solution

Many times change agents become so enamored with the latest process, tool or practice which they are championing, that they try to sell the solution to the organization for the sake of the solution. In effect, it becomes a solution in search of a problem.

Whether it is a new scheduling tool, risk management process, or project review methodology, we have learned that to be more successful, the approach has to be reversed. First a problem has to be identified, and *then* a solution can be applied. The advantage of this approach is that you are helping to solve someone's business problem, while gaining support for your solution at the same time. Further, to increase the probability of solving the business problem, the change agent should tailor the solution to fit the organizational culture, processes, and application. If your company is anything like Intel, this is critically important in order to get over the "not invented here" hurdle.

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In 2002, after reading Norm Kerth's book *Project Retrospectives: A Handbook for Team Reviews*, Debra was so moved by the possibility of a better, more effective way to capture learnings that she decided to attempt to introduce the method into Intel. She saw the opportunity to pilot the practice with a team who had invited her to help them improve their requirements engineering practices. The intent was to uncover what worked well on their last project, and to identify what the team wanted to do differently on the next project – which at the time was entering the requirements gathering and specification phase. Comments from the team such as “our requirements sucked last time” prompted Debra to ask the project manager if she could get the team together to do a retrospective to find out what they really meant by “our requirements sucked”, and what the business impacts were.

Start Small and Establish Pull

When introducing a new idea into an organization, we have found that it is beneficial to start with a small implementation, and expand once demonstrable results are achieved. We always try to begin with a proof of concept or pilot implementation so we can control the organizational variables involved. This “incubator” approach increases the probability of successfully achieving positive business results.

Debra followed this approach for retrospectives by approaching a single project manager within Intel who she knew would be open to trying something new and had a business problem to solve (requirements that sucked). She began by holding a two hour face-to-face meeting where the stage was set to collect perceptions from the team and to uncover what happened on the previous project specific to requirements activities. She and the team spent an additional hour harvesting the data to identify primary sources of the problem and to develop action plans going forward. At the end of the meeting, she asked the team if they felt the time spent generating insights was valuable. The feedback was overwhelmingly positive.

In fact, the project manager was so pleased that he agreed to sponsor Debra's work within the organization, and accompany her to pitch retrospectives to his senior management team as a standard method of collecting project learnings and implementing improvement actions within the business group. Once the briefing to the senior management team was completed, they were so intrigued by the results of the initial retrospective that they asked Debra to conduct an end of project retrospective for every project in their business group. Over the course of a year, she facilitated over 15 post-project retrospectives within that business unit. From the data that was collected, common themes and improvement opportunities emerged which resulted in standardization of some key program and project management processes, such as good requirements engineering practices. Additionally, the retrospectives methodology was established as a standard practice on all programs and projects within the business group.

What happened next was interesting, and a bit surprising. Program and project managers from other business groups started to hear about the results that were being realized in the original

business group, and wanted a piece of the action. “We want what they have” was a common statement from the other business groups. By demonstrating positive business results, Debra created pull for retrospectives at a much greater scale than had ever been anticipated.

Tailor the Solution as Needed

As more and more teams were conducting post-project retrospectives to improve their requirements processes, we came to realize that by facilitating a mid-cycle retrospective, for example, right after the requirements specification was complete, it would allow a team to capture learnings as they occurred and when their memories were still fresh. This change in the retrospective methodology created the opportunity for a project that was in-flight to benefit from the learnings and implement improvement actions. The program and project teams no longer had to wait until the next program or project to realize the benefits. The result of the methodology change was to achieve better results by conducting multiple retrospectives along the way, and implementing improvements into an organization faster. The standard retrospective methodology that we now use at Intel recommends multiple retrospectives at three strategic milestones during the course of a project lifecycle.

Gain Senior Management Support for Broad Deployment

Organizational buy-in is vital for the wide-spread success of any initiative, and senior management support is critical to achieving that buy-in. However, senior managers don't have to be intimately involved from the beginning. Allowing a new idea to gain support and momentum prior to exposure to senior management is a good strategy, as we have demonstrated. To gain wide-spread adoption and organizational support for the new idea normally *does* require the endorsement and advocacy of the senior leaders of an organization.

Over the past six years, the momentum for retrospectives has bubbled up to the senior management level many times as a result of a program or project team sharing learnings and distributing action plans within a business group. During one project retrospective, where the project manager wasn't originally sure he wanted to do a full retrospective, the senior manager of the business group was invited to participate. As the end of the process, the senior manager stated that he liked the result of the “new” approach and wanted all teams to adopt this methodology. The funny part was that unbeknownst to the senior leader, the large majority of the teams in his organization were already doing some form of retrospectives.

Senior management support has allowed us to approach teams who had previously shunned the new practice. Each year we have facilitated more retrospectives. At one point, the pull for a skilled, retrospective facilitator was more than one person could keep up with. To accommodate the increase in demand, we established a full day training course to develop facilitators in each business unit. Our philosophy is that we want to train at least two program managers from each business unit so they can be a resource for the whole group. Growing the skill set within the

business unit allowed more retrospectives to be conducted. To date we have over 65 trained facilitators at Intel.

This scenario takes years to achieve. What if you don't have six years to build momentum for retrospectives? How would you approach a senior manager who has not expressed an interest in retrospectives? We have found that the higher you go into an organization, the more important it is to be able to articulate the benefits of retrospectives to gain organizational buy-in. Showing senior managers that retrospectives can improve productivity, reduce costs, and increase efficiency all helped gain support for retrospectives across our company.

Conclusion

Rather than ask senior leaders to mandate "all programs and projects shall conduct a retrospective at three strategic milestones" we have found a more organic, bottoms-up pull for the practice has worked at Intel. Start small, with a team who is open to trying a retrospective. Show results on a pilot implementation, then others will come knocking on your door. To accelerate the adoption, meet with top leaders to share results and educate them on the benefits of multiple retrospectives, spread across the lifecycle of a project.

This approach has proven to be our recipe for successful organizational buy-in which resulted in obtaining resources needed to persuade teams and business groups to adopt retrospectives as a common practice for capturing key learnings and driving improvement actions.

In the next paper in this series we will focus on the people side of program and project retrospectives. We will describe how to deal with the human aspect of introducing change into an organization and requiring people to behave differently.

For more information on retrospectives for your organization, you can contact us at info@programmanagement-academy.com.



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Debra Lavell works as a retrospectives expert in the Corporate Platform Office at Intel Corporation, and has delivered over 80 program and milestone retrospectives over the past 5 years. She also designed the “Facilitating Effective Retrospectives” training course which she has delivered to over 50 program and project teams. In addition to her work in retrospectives, Debra is also a recognized expert in requirements engineering, is a member of the Rose City Software Process Improvement Network Steering Committee, and president of the annual Pacific Northwest Software Quality Conference.



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