

The Project Status Meeting and how it could go

By Nels Hoenig, PMP and Susan Snedaker

Your project is moving along ontime and onschedule...well it's pretty close anyway. Yes, there has been slippage on the delivery date and not all the features are there. Sure some costs came in a little over budget, but that is why it is called a plan and a budget. You have been generating status reports almost every week. The number of open bugs are dropping and you feel pretty good.

So, you walk into the monthly staff meeting confident, prepared to watch those other guys sweat. But, as you enter the room you notice the conversation comes to a halt and everyone is looking at you like you just ran over the plant manager's dog. Everyone seems so relieved that you came to the meeting but you start to get nervous when the plant manager says to you, "For today's staff meeting we are going to focus on your project and review its status exclusively. I also have the corporate CIO, Hank, "The Hammer," on the speaker phone as he asked for this meeting specifically." You suddenly feel like the guy in the deodorant commercials. However, you have all your status reports up to date and have been doing a good job of change management, so maybe this won't be that bad...

Let's listen in for the things you never want to hear at a status meeting and figure out how to deliver that perfect answer.

○ Who Approved "That"?

"We have completed the design and development on the enhanced customer look-up feature..."

From the speaker phone, you hear Hank bark, "Who approved THAT?"

You're ready, "Hi Hank, we approved that in the change management meeting two weeks ago, it's Change Request 435. As you recall, you were concerned that the customer look-up process was going to take too long and impact response time. We were able to design the feature so that it can actually be used by both customer service and shipping and looks pretty nice in testing. This was one of the critical features you wanted added."

"Oh yea, that's right." replies Hank.

○ Where is my feature?

Reva, the Customer Service Manager now says, "What about the ability to look up customers by phone number? I told Craig (The Business Analyst) how important this was to me."

You're on it! You reply, "Reva, this is not in the current approved project scope because not all of our customers have dedicated telephone numbers. We can't put that feature in until phase two but we have some ideas on using Caller ID to display the customer information on the telephone prior to answering the call as a work around."

"That would be neat," replies Reva.

○ **When will it be done?**

From the speaker phone you hear a testy Hank ask, “This project is way past due, when is this project going to be released?”

“That’s correct Hank, the original schedule called for this product to be done two months ago, but because of the mandates from finance for Sarbanes-Oxley changes and the new server implementation from IT taking priority, we agreed in our meeting on September 22nd to slip the schedule. The current plan calls for beta testing to start in 30 days with a full release in 90 days. I have kept the project plan updated to reflect the slippages as they occur and think we are within the contingencies allowed for the project when we factor out the external issues.” Silence on the phone.

○ **You spent how much?**

Now Ralph asks, “Why is this project costing so much more than the approved budget?”

“You’re right that we are over the original budget on some costs. The project was originally planned and budgeted to use only internal developers, but most of them have been assigned to project Wolfbane (a secret project so confidential I can’t reveal any details in print). To meet the schedule, it was approved to increase the number of consultants on the project. We processed a change order (I believe that’s Change Request 442) to reflect the projected new costs and Hank approved the change on December 24th. When I compare the actual costs to the projected costs based on the revised budget, we are still over budgeted costs, but the scope changes done were worth the added costs and they were approved by the change management team.” Again, silence on the phone.

○ **It was only a small change.**

“How come you made the change to allow auto-faxing of sales orders, it was not part of the original plan?” asked Beth from IT.

You smile and say, “Well this issue was found during the detailed project design phase when we were reviewing how the application would actually be used by customer service. They pointed out the current process of printing the sales order, faxing it to the customer, then throwing away the printed copy wasted a lot of time and paper.

We did a quick analysis and found the effort involved was pretty small and the payback was under two months. By including it in this version, we can avoid changing the code we just wrote and also start getting this savings as soon as possible. It is also a very popular idea with the customer service people and will help get them excited about learning the new application. The change order, number 457, was approved last month I think.”

○ **Don't worry, you can have him back in two weeks.**

“Hey that reminds me, I need to have Kaushal work on project “Wolfbane” for about two weeks starting Monday, is that OK?” adds Beth.

“Well Kaushal is pretty deep in the code for the credit checking process and if we take him off the project, it will certainly impact my project schedule. Does it have to be Kaushal? He is my expert developer on the interfaces and I can't really afford to lose him right now. Can we get together to brainstorm options after this status meeting and determine the best option?”

You smile to yourself: By keeping this a status meeting and not a discussion meeting you avoid wasting people's time and keep better control on your project and your key staff.

○ **Why are we still planning when we could be coding?**

“We are just about through with the new design for the invoice and the print program and should be able to start coding soon...”

“Why are we spending so much time designing a simple form? My son in-law told me his company built a new invoice and had it implemented in 10 days and that it was working great until he got laid-off.” asks Linda from finance.

“Well Linda, the business requirements for the invoice are pretty complex since it can be accessed and printed either here or by the customer from the Web site. In addition, we had to resolve the finance calculation issue and how to display the currency options for the customers in Mexico and China. We don't want to have all the issues that happened when we rushed out the catalog request form and forgot that some countries don't use all numbers in the zip code.”

You think to yourself: We found that by spending the time to design it right the first time, we have to make fewer corrections, speeding up the actual development.

○ **We will figure it out later.**

“We are still testing the various printers in consideration for the customer service area...”

“You mean we are almost done with the project and you still don't know what kind of printer we are going to be using!” comments Hank.

“Yes Hank, we are trying some different printers to find the one that is most cost effective and easiest to use. They all support our print file standards and we are finding that the more time we spend testing, the better pricing the vendors are prepared to offer. It looks like we will be under budget on the printers and actually be able to get ones that are better than we had planned.”

○ **How come QA is still reporting bugs?**

“In terms of QA and testing, the number of open bugs is continuing to drop and the number of new critical bugs is really starting to drop off...”

“What is the story on those guys in QA? I mean how many tests does it take to find the bugs in this code, it seems like testing is never going to end” asks Patty from manufacturing.

“Gee Patty, the only way we can effectively inspect the code is to test it to make sure it works in every scenario. As this application touches all the aspects of order entry, we are trying very hard to make sure all critical features work without issue and that as much of the code gets tested as possible. As each new feature is released to us for test, we need to ensure that it works correctly and that it does not break anything else in the rest of the application. We are using automated testing to test much of the application but remember, software applications are complicated and each feature needs to be tested both to make sure it works correctly and that when a user does something wrong, it handles that correctly too. We don’t want another situation where we ship orders to a customer who is on credit hold!

You think: boy am I glad I was not involved in that one, imagine shipping all that product to a customer who only had a PO Box and ignoring the credit limit checking...I wonder if they ever caught that guy...

○ **Why can’t we just add some more programmers to get this done?**

“So in conclusion, I think we are in pretty good shape to have the application ready for release in about 90 days which lines up with the current schedule.”

“I need to be able to announce this in the current quarter, says Lisa (The CFO).

“Lisa, I am not sure we can meet that deadline with the all the features of the application you want. We looked last month at whether bringing in more developers could help us and right now the product is so complex it would actually take more time for the current developers to teach the new developers than we would save. The other option was to break this release into phases, we have the customer service application pretty well tested now and have been spending most of our effort on the Web site that will let customers go online to see their information. We could release the customer service application first and then in the next phase add the access to the Web site. However, since we will now have a live and test area to support, it will require more time and likely more money to get the Web site out than we currently have in the project plan. If you are interested, we can write up a change request and make sure we have covered all the issues with this change and submit to the change management committee.”

“Great Job!” says Hank from the speaker phone“. I feel a lot better about the project now and once this gets released I need to talk to you about becoming.....”

Bringgg, Bringggg the Phone is ringing.....

Suddenly you realize that this was just a dream and that it is five minutes after the status meeting was scheduled to start and that Hank is calling you to find out why you aren't there.....AGAIN.

- Got to find the project plan, no not that one, the current one.
- Now where are my notes from the change meeting? Darn, I was supposed to have emailed them out last week.
- What this? Another invoice from the consultants! Past Due, how can that be?
- I have got to get this office organized!
- Why do people keep sending me emails of "Dilbert"?

Project status meetings are a fact of life and how we prepare for and react during these meetings will convey your perception on the project and its progress. Many of the problems we face in project management can be addressed by using a proactive management style. Every project will have different issues but the most common point of failure is a lack of communication and a lack of consistent planning/execution.

This article is based on the recently released book *How to Cheat at IT Project Management* by Susan Snedaker, technical editor Nels Hoenig, published by Syngress Press. Inc. at www.syngress.com.

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