

GETTING NEW PRACTICES USED AND KEEPING THEM VISIBLE

By Neil Potter and Mary Sakry

Introduction

Does this sound familiar? A new process for *fill-in-the-blank* is created. It is used by five percent of your organization, and then a few months later, 10 percent. After one year, no one has seen or heard of it. The process is no longer used.

New practices in an organization typically suffer from being out-of-sight and out-of-mind. When they are first created, they are used by a handful of projects. After some management push and word-of-mouth advertising, the processes are used more widely. However, without a strategy in place for maintaining the gains, the organization can revert back to its previous ways and ignore these new methods.

This article explains one approach for making new practices visible so that they are performed long-term.

Attach them to what is visible today

Eliminate the out-of-sight and out-of-mind problem by adding each new practice to any task or process that *currently* has visibility. For example, in our company, when we create or revise course materials, we always follow a change control process. This two-page document lists all the activities required to introduce the change correctly into the materials and deliver it to the printer for copies. New practices for improving any aspect of the binder creation process are added to this document to ensure that they are executed each time. Defining new practices in other documents would guarantee them being ignored.

Similarly, when we conduct process appraisals for clients, we fill out a plan template that defines all the work to be done. During the appraisal, any strength or weakness in the appraisal process is noted, and new steps and refinements are then added to this template for



the next appraisal. One template is used all the time, and anything new is added to it.

Consider the following examples, and add new practices for your organization in a place that already has visibility.

- Add new practices to existing project reviews (such as weekly project team staff meetings, life cycle milestone reviews and formal peer reviews). In many organizations, project status reviews are well ingrained, so adding anything to them becomes equally ingrained.
- Add practices to the definition of major project milestones. For example, if there is a major milestone routinely performed to approve project estimates, revise the definition of that milestone to require the estimate to be checked against historical data, or to be accompanied by a risk assessment.
- Add practices to existing templates that are routinely used. For example, add a risk priority column to a risk table, or add a section for system interfaces to a design document.

As improvements are identified, update the process documents so they do not collect dust. Constant use and refinement avoids process assets from becoming irrelevant, bureaucratic, and treated as excessive paperwork.

Using a life cycle

The life cycle in Figure 1 is an example of the mechanism used by one group to organize its new and existing practices. Each life cycle step is defined in a separate web page. As the group adopts new practices from various quality frameworks (such as Scrum, ISO and CMMI), the definition of each phase is altered to capture these new tasks. The process engineers in the company use the life cycle as their mechanism to communicate new practices to the project teams. The software and hardware engineers use the life cycle routinely to plan and organize their work.

The risk of using a life cycle

If you adopt the idea of using a life cycle to capture new practices and make them visible, watch out for the risk of the life cycle definition becoming a burden to the organization.

The typical cradle-to-grave seasons that a life cycle experiences are:

- In the beginning, a division of a company realizes that projects have a chronic problem (for example, missing deadlines). After some analysis, the group realizes that these problems surface very late, leaving no time to recover, except for announcing large delays in the deadline.
- As a solution, phase reviews are established at specific points in each project to provide early visibility into progress. The phase reviews are defined as gates that must be passed through.
- To make the phase reviews standard across the

division, defined artifacts are required to be created to pass each phase review gate (e.g., project plan, requirements document, and test results). Templates are developed to make artifact creation easier.

- The templates are all-encompassing and don't provide adequate guidance for when specific sections can be dropped. Since the templates *must* be completed prior to each gate review, team members fill them out as best as they can.
- Time pressure causes the gate reviews to be rushed, and it is noticed that the artifacts are not all looked at by the senior managers. Team members realize this and start creating "just good enough" artifacts to pass the reviews in the future.

Success is always the result of dedicated time and focus to make the life cycle work.

- The people who attend the reviews are not prepared, and the reviews no longer trap problems as initially intended. Instead, it now only has the effect of slowing a project down.
- Further time pressures cause the reviews to be cut altogether, and it is assumed that if projects were not on track, project team members would have already spoken up, so why have gate reviews?
- Within two years, projects are again chronically late and phase reviews are reinstated, for the very same reason stated two years prior!

Life cycles, similar to processes, can be misused and become a burden, or be actively used and refined to manage project work successfully. Success is always the result of dedicated time and focus to make

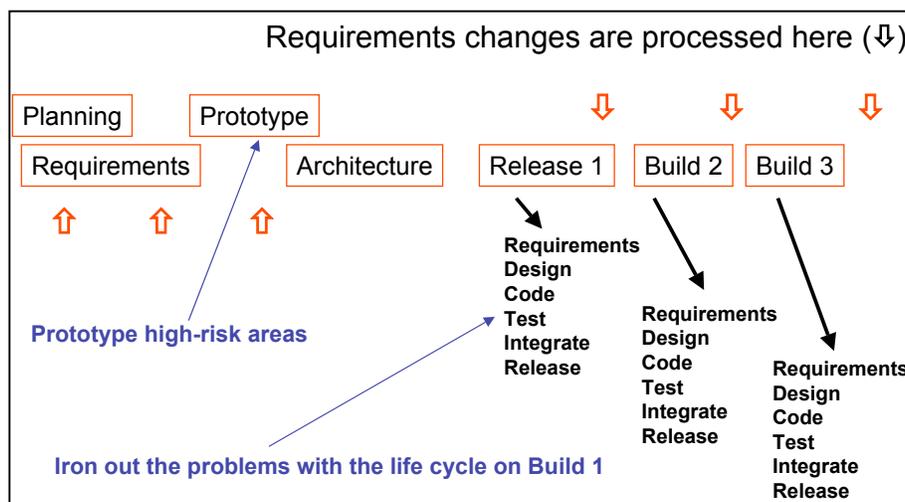


Figure 1 Life cycle used to capture and organize practices

the life cycle work.

Life cycles can be made effective with the following actions:

- Include senior managers in the design of the phase reviews. Phase reviews must provide value to the manager, typically by providing visibility in project status, issues, risks and estimates to completion.



- Include in each review the senior managers who have oversight of the programs being reviewed.
- Keep the review short (e.g., 1-2 hours) by discussing only critical items (e.g., current tasks completed, critical path, issues, risks and the plan for the next phase).
- Define a few specific criteria that must be met to exit each phase, for example:
 - Exit the planning phase when a project plan exists and all resources are committed.
 - Exit the design phase when the design has been inspected and all defects resolved.
 - Exit the implementation phase when the solution has been tested, customer champions are satisfied, all defects are repaired or resolved, and relevant files are placed under configuration control.
- Add a qualified person from outside of the project to keep the session objective (either another manager or quality assurance person). Without an objective person, people familiar with the project can rationalize that exit criteria are met even when they are not.
- Conduct a lessons-learned session for 10 minutes at the end of each gate review to refine the next review.

Example lessons include: improved review preparation, tabling discussions not related to exiting the phase, putting project templates on a diet, capturing decisions in meeting minutes to avoid future rehashing, and refining gate exit criteria for subsequent iterations.

Summary

New practices can die very quickly if they are not made visible. Visibility can be achieved by systematically adding new practices to existing visible activities.

Without visibility and attention, any new practice can become burdensome, die, or allow old quality problems to resurface.

GETTING CLARITY FROM A PILE OF TO-DOS

Do you ever feel overwhelmed with a pile of tasks facing you, or one large overwhelming project? Just deciding where to start blocks any action. If so, see if the following two questions help.

What is the desired result?

You're not allowed to spend three weeks on this question! You have three minutes and you can only use one sentence. "Deliver part X of the project next week," or, "Complete the database portion by December 12," or, "Record all sections by Friday." You have to think of it and write it down quickly. If you have many unrelated "To-Do's" in your head, write down two or three major outcomes that summarize them. The purpose of the question is to boil up to the top of your head quickly the result you really want.

My next action is?

Again, you have 3 minutes. You only have to think of one action to make even the smallest amount of progress on the desired outcome. Your *next action* could be to make a phone call, write a task list, schedule an event in a calendar or send something out for review. "My next action is?" is meant to get you moving; it is not a recommendation that you blindly take independent random actions hoping the outcome will occur.

For more information on Time Management, see our *Time Management* workshop on our services web page.

Practical Solutions for Your Project Challenges

Also available: Webinar-style sessions to save on travel, and onsite coaching to save on time.

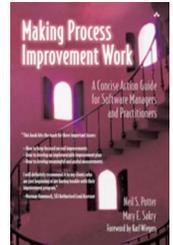
- ❑ **Run your software development projects faster and incrementally.**
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Two-day workshop, IN SEARCH OF EXCELLENT REQUIREMENTS.
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Three-day workshop, PROJECT PLANNING AND MANAGEMENT.
- ❑ **Meet project deadlines. Scope and estimate the project work.**
One-day workshop, PROJECT ESTIMATION.
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Detailed information on our services is available at www.processgroup.com/services.htm. Contact us at 972-418-9541 or help@processgroup.com to discuss your needs.

Read our book!

Also available in Chinese and Japanese.
See www.processgroup.com/tpgbook.htm

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Foreword by Karl Wieggers

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References

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