

Project Management Tales –

We'll Cross Our Fingers and Hope for the Best

By Debbie Gallagher



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Each story in this series of Project Management Tales is true, but company names have been changed. Some stories occurred in Canada and others took place in the US or overseas.

Background

Acme Corporation was implementing a new distribution system and hired Standard Consulting as their implementation partner. They were also installing new manufacturing software, the implementation of which was already under way and was to be completed before distribution.

There were a lot of custom reports required for both manufacturing and distribution. Acme had identified a few hundred necessary reports, including fifty reports for distribution that were critical to go-live. The report development for the manufacturing module had not gone well, as many reports were incomplete and some reports that were done were buggy.

Acme decided to manage its own report development. An Acme manager was put in charge of report development.

The Situation

The Standard Consulting project manager asked the new reporting team lead for the workplan. The report team lead had no intention of developing a work plan, as it seemed a waste of time. The project manager asked, "How do you know you'll be done the critical reports in time for go-live?" The report team lead replied, "We'll cross our fingers and hope for the best. After all, we always come through in the end."

Action Taken

Despite the assurances of the report team lead, the project manager continued to insist on a work plan. Finally, the project manager prevailed. She had the two most experienced report developers stop work on reports.

Instead, they were asked to define the development tool to use for each report, as well as the estimated effort for coding, testing, and promotion to production environment. The project manager used this information to build a work plan.

The report team-lead started to realize there was a lot more to report-development than just the coding. In addition, the work plan made it clear that the fifty critical reports for go-live could not possibly be completed in time for go-live.

However, the report team lead was worried about looking bad, and didn't want anyone to know about the possibility that the reports might not get finished. He asked the project manager to avoid discussing the report workplan issue at the status meeting. Despite the workplan, he hoped the reports would get done on time.

The project manager insisted that since the problem had been identified, it had to be raised as a project issue. The report team lead finally agreed.

The project manager and the report team lead met with the distribution team and explained the problem. The distribution team was terribly upset about the reports at first, but then agreed to help solve the problem.

Epilogue

The distribution team prioritized their reports, and with discussion it became clear that only two reports actually had to be run on the day of go-live. Several others were not needed until the end of the first week, others at the two-week mark, and most at month-end.

There were even some reports that were not needed until year-end, which was six months after go-live.

When the reports issue was raised at the project status meeting, the manufacturing team offered to prioritize their remaining reports to free up resources to work on the distribution reports. In addition, the Acme project director offered to provide some extra report writing staff.

Both the manufacturing and distribution modules went live on time. In addition, the critical reports for both modules were available by the new prioritized deadlines.

Conclusions


The report team lead's project management approach of crossing his fingers and hoping for the best was not realistic.

Once he made the other team members aware of the reporting delivery problems, everyone pitched in to help solve the problem.

The distribution team prioritized their reports realistically, the manufacturing team delayed some of their reports to free up resources, and the client provided additional help. None of this could have happened if the team lead kept his problem secret.

Being realistic and truthful with the team also builds trust. Team members will believe the team lead in future, if he is always open with them about problems and successes.

Even though the client was responsible for its own report development, the consulting firm project manager was right to insist on a proper work plan for the reports. The reports were needed for the implementation, for which the project manager was responsible.

Without the work plan, no one had any idea of the extent of work involved, and it was impossible to predict success or failure. 

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Debbie's previous "Project Management Tales" are available on her personal web site:
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