

Is it Time to Pull Over and Check Under the Hood?



Something isn't right. Your instincts are telling you that one of your flagship projects — the one everyone is watching to see whether it succeeds or not — is at serious risk. You're being plagued by missed deadlines. Cost over-runs. Scope creep that has broken into a dead run. Loss of focus on desired goals and business benefits. Status reports gloss over the issues and promise to "get back on track." The anxiety is mounting. You need help — a course correction, a tune-up, maybe major, maybe minor — but how do you go about getting an independent, unbiased opinion on what that should look like?

Ask the experts and get a SuccessCheck™

At Clarkston Consulting, we're known for our ability to partner with clients to deliver projects on-time and on-budget, and also for our ability to turn around ailing projects and get them on the road to recovery. A key component of our methodology is SuccessCheck™ - a formal, structured methodology for taking the pulse of the project — and recommending corrective action when necessary. Three experts at Clarkston Consulting — Neil Nelson, president and co-founder of Clarkston Consulting; Monty Hamilton, a partner at Clarkston and currently CEO of Rural Sourcing, Inc. (RSI), Clarkston's wholly-owned domestic sourcing company; and Jeff Graffeo, partner in Clarkston's life sciences vertical - offered these insights on the SuccessCheck experience and the results you can expect.

How does SuccessCheck work?

We want to take an accurate pulse of your project — what were the original objectives, and is the project still on track to meet those objectives? We begin with off-site preparation, reviewing project documents, preparing for interviews, and working with you to design a SuccessCheck that is tailored to your organization. Once onsite, we interview all the key stakeholders for the project

—not just the high-level executives, but a cross-section of people on the project—so we can understand the details at different levels. Once we gather the perspectives of executives, managers, and directors, we'll talk to some of the people who work on the project on a daily basis — key folks who have their hands and minds deeply involved in the project and have an operational perspective. Those three perspectives, Executive, Management, and Operations — what we refer to as EMO — are the essential ingredients for a SuccessCheck.

Key areas we analyze for a SuccessCheck:

- Business benefits realization
- Scope management
- Time management
- Cost management
- Quality management
- Human resource management
- Communications
- Risks and issues management
- Stakeholder satisfaction (including knowledge transfer)

What makes SuccessCheck different?

SuccessCheck is not a conventional audit. Our goal is not to identify and pass blame for things that have been executed unsuccessfully. The aim is to understand how things are supposed to be working so that we can recommend approaches that will make the project more successful. SuccessCheck goes beyond focusing on areas for improvements by reinforcing the positive outcomes and capturing lessons learned for future endeavors.

“The discipline and approach of Clarkston Consulting's SuccessCheck program is very impressive. It has been invaluable in helping us maintain a pulse on a broad range of stakeholders and apply course corrections during our implementation efforts.”

Carl Cichetti
Seneca Foods

SuccessCheck is not just for projects in jeopardy - we do this type of health check on all of our own projects. And SuccessCheck is not just for large systems implementations, but for any mission critical project that has the chance to derail if not monitored closely. Our Coherent Speed™ methodology recommends these checks at pre-scheduled points in the project – typically prior to the start of the next big phase/critical task - while you still have time to take corrective actions for the remaining milestones.

What are the steps in the SuccessCheck process?

Our preparation for a SuccessCheck is quite extensive. We start with our own tools and templates and draft the interview guides. Key to that preparation is a review of the project charter and original business case for the project, keeping our focus on the anticipated business benefits and whether the project is on track to meet them. Importantly, before we start interviewing, we have you approve the list of interviewees and the questions we'll be asking. This helps us gain buy-in to the final review, but it also helps us establish the scope of the health check. Using the analogy of a real health check, if the patient had a headache we wouldn't necessarily want to examine the fingers and toes. So it's an assurance that we're focusing on the right areas.

We often look at key project deliverables and make an assessment on the quality

of those deliverables. How well are they being executed and are they in line with industry best practices?

Our Ask the Experts panel includes three Clarkston Consulting partners who average 20 years experience and over 75 SuccessChecks themselves.

Neil Nelson – President and Co-Founder. In addition to driving the evolution of Clarkston's service offerings to address the burning issues of life sciences and consumer products companies, Neil has performed over 50 SuccessChecks for our clients.

Monty Hamilton – Partner and CEO Rural Sourcing, Inc. After serving for several years as the Regional Managing Partner for Clarkston's Southern region, Monty is now the CEO of RSI, a Clarkston wholly-owned domestic sourcing company. Monty has delivered more than 20 SuccessChecks as a QA partner on different engagements.

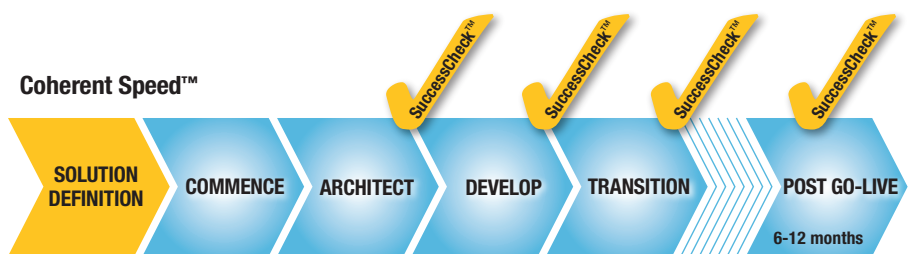
Jeff Graffeo – Partner, Clarkston Consulting. Jeff has more than 14 years of large scale, systems implementation consulting experience in life sciences and consumer products and has delivered more than a dozen SuccessChecks.

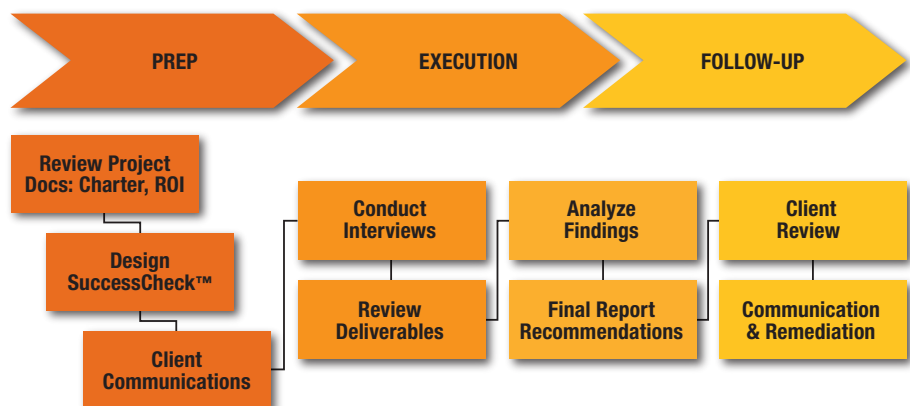
What kinds of questions are asked during stakeholder interviews?

Our first questions are usually about the business benefits of the project, the overall objectives, and making sure those are consistent and have not been lost in the depths of daily execution. Of single most importance is whether the project is on track to achieve the original goals and benefits that were used to justify the project in the first place. Next, we assess the project governance. We'll ask about the steering committee, project or program management office (PMO), communications, project status, risk management, change management, any contingency planning; are all these things being done effectively?

Our project governance questions focus on both the structure and the effectiveness of the processes. For example, who are the project sponsors, are the right people involved? What does the project team structure look like? How does the escalation process work? How extensively are the project sponsors involved, and how does project management interact with the team? In addition to how the project is being governed, these questions will give us a good feel for the health of the project as well as the people dynamics.

During our interviews we also look at the personality of the project – how are the team members jelling? And then on a larger scale, has the rest of the company bought in to the project? Are the sponsors visible and audible in the support of the project? Is there unequivocal commitment? Are incentives in place? Are there barriers that will prevent success? We use an extensive list of questions to fill in the details and our experts probe deeper when needed.





Clarkston's SuccessCheck - preparation, execution, and follow-up

How do you get stakeholders to open up?

We ask our sponsor to send out communications ahead of time explaining who we are, what we're doing and why, encouraging the interviewees to feel free to talk candidly about what's wrong, why it's wrong, and to share their views on how to move forward. We also ensure our interviewees that comments are confidential. We never reveal the sources to our sponsors, but rather look for common themes across the stakeholder groups. Given this assurance, people are typically more willing to speak what's on their minds. Upfront strong communications from senior management sets the stage for this to happen.

Another component of the process that encourages openness is the fact that we are an independent third party conducting the interviews. Some things

individuals would like to say about their project aren't easily said to a co-worker or colleague. When we appear as an impartial participant, these sources tend to divulge things that they might not to internal sources. Being removed from the day-to-day routine, we often gain a clearer perspective, and we can see where things are headed. Sometimes it's hard to "see the snake when you're waist-high in the grass."

In fact, the level of openness can reveal important information about the health of the project. Certain people may not open up as much, but others will open up quite a bit, which is a telling sign that something could be going on. In our experience, we don't have problems with people talking to us; they often use us as a sounding board to vet potential frustrations.

“The key to a good SuccessCheck is to ask the right follow up questions, probe when needed, and compare what we are hearing to what we know is best practice or what works.”

Neil Nelson
President & Co-founder
Clarkston Consulting

Tips for a thorough project health check:

- Use a third party to ensure objectivity and the confidence of the interviewees.
- Focus on ensuring success of the effort for the short term and long term.
- Include face-to-face discussions and interviews along with an analysis of existing deliverables.
- Reach out to a cross section of executives, management and operational individuals in stakeholder interviews.
- Prepare a final documented report with observations, recommendations, and action plans.

What's in the final assessment?

We analyze all of the gathered information and create a final report that scores or rates the project in several different dimensions. Using that, we can point directly to the issues and the risks. Then we make recommendations for every dimension on how you should proceed. When we present this final report to the project sponsor, we'll sit down and review the findings and recommendations. The final recommendations and remediation plan are shared with the steering committee and other senior management. We also recommend that a summary of the report be shared with all those interviewed as a way to close the loop and ensure future success.

SuccessCheck is a quality practice that should be shared with the entire team. That's why the final report doesn't just focus on the negatives. It highlights the areas where the project is doing well and identifies where things are not going

well in order to add value and build action into the process. Going through the process roots out good things and bad things. Through the positives and the negatives, our aim is proactive problem prevention that saves money and saves time and gives you the opportunity to treat the root causes before they become major issues.

What are some common problems uncovered during SuccessChecks?

What we often see is a steering committee that wasn't in place or wasn't structured or executed to be effective. Every strategic project endeavor needs a steering committee, with assigned individuals that meet and are active in every meeting with the right levels represented.

Because we also look at project dependencies outside the control of the team, we often uncover risks that weren't readily visible to the steering committee. Sometimes, the SuccessCheck identifies significant dependencies on another project that is understaffed and consistently misses milestones. At program-level meetings, the message is always, "yes, we'll meet the date." With the

SuccessCheck, we are able to challenge these project teams and get executive sponsorship to convey that unless the core issues are fixed, we'll all fall behind. So they can address the other project's issues and resolve the staffing issues.

Sometimes it comes down to a gut feeling. On one SuccessCheck, the CIO just knew deep down that something was wrong. The executive sponsors were being told one story, but something didn't add up. Using a SuccessCheck as a second set of eyes on the project, we were able to point out the core differences between the reported status and reality. We gave them a clear, honest picture of the actual situation.

In the past, companies may have tolerated mismanagement, missed deadlines and excessive budget overruns. They may have been more willing to throw bad money after good. In today's business climate, that's not an option. Companies are pulling the trigger to make significant changes. Changes could range from removing the consulting partner and doing the project internally, or finding a new consultant to take the

project and get it back on track, or in some cases, even shutting the project down. Whichever choice you make, you shouldn't act until you take a look under the hood and identify exactly what's making your project engine stall.

How long does a SuccessCheck take?

It depends on the project and scope of the SuccessCheck. Some are as small as two or three 30-minute interviews. Others have covered multiple days interviewing up to 20 individuals. On average, it takes a couple weeks to design and plan, schedule interviews, conduct the interviews, summarize and analyze the results, make recommendations and document a report.

Do you need to 'pull over' and check under the hood?

We've been doing SuccessChecks for a long time. We have a proven track record and execute these quickly and seamlessly. Whoever you choose to check on the health of your projects, be sure they have the resources, methodology, best practices and approach to get it back on track and on budget to achieve its business benefits.

Do you need an independent, unbiased review of your mission-critical project? Do you need an accurate read on the health and progress of your most visible enterprise initiatives? If you are interested in finding out more, contact Rob Klein at **877-362-3649** or **rklein@clarkstonconsulting.com**.

“We get the client looking forward, and in most cases we're able to address little problems before they become big problems.”

Monty Hamilton
CEO, RSI



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Clarkston Consulting is a different kind of management and technology consulting firm. We deliver a unique experience for market leaders within the Consumer Products and Life Sciences industries. Considering professionalism, expertise, and value as prerequisites, we take service a step further through our unyielding commitment to the success of people as individuals, both our clients and our employees. By combining integrity, adaptability, and a whatever-it-takes attitude, we have achieved an extremely high rate of referral and repeat business and a 7-year average client satisfaction rating of 97%.