IS IT TIME TO PULL OVER AND CHECK UNDER THE HOOD?

CLARKSTON CONSULTING SUCCESSCHECK ™

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. There's a loss of focus on desired goals and business benefits. Your 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 as well as 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.

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:

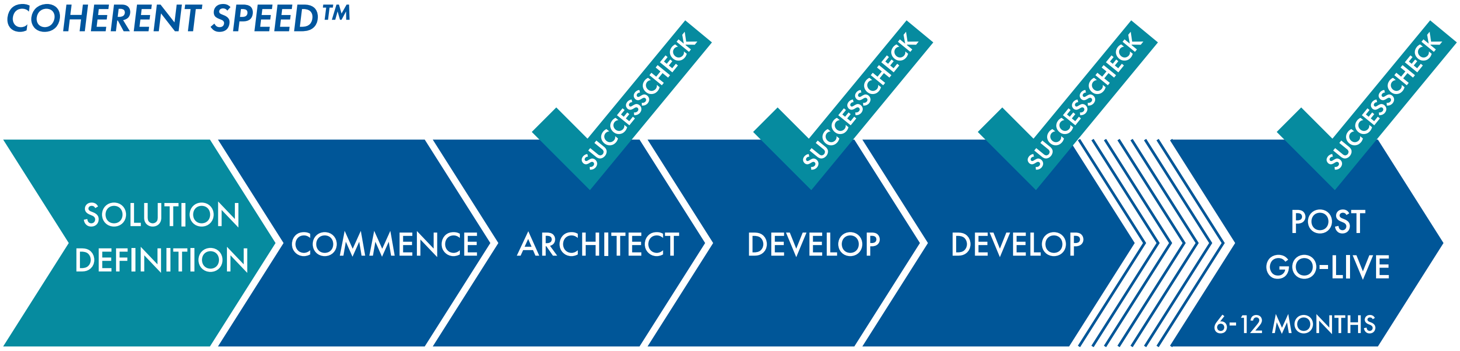
- ✓ Business benefits realization
- ✓ Scope management
- ✓ Time management
- ✓ Cost management
- ✓ Quality management
- ✓ Human resource management
- ✓ Communications
- ✓ Risks and issues management
- ✓ Stakeholder satisfaction (including knowledge transfer)

WHAT MAKES SUCCESSCHECK DIFFERENT?

SuccessCheck isn't a conventional audit. Our goal isn't to identify and pass blame for things that have been executed unsuccessfully. Rather, 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.

SuccessCheck isn't just for projects in jeopardy – we do this type of health check on all of our own projects. And SuccessCheck isn't just for large systems implementations, but for any mission-critical project that has the chance to derail if not monitored closely. Our Coherent SpeedTM 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.

COHERENT SPEED™



"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.''

- CEO of a Consumer Products Company

WHAT MAKES SUCCESSCHECK DIFFERENT?

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.

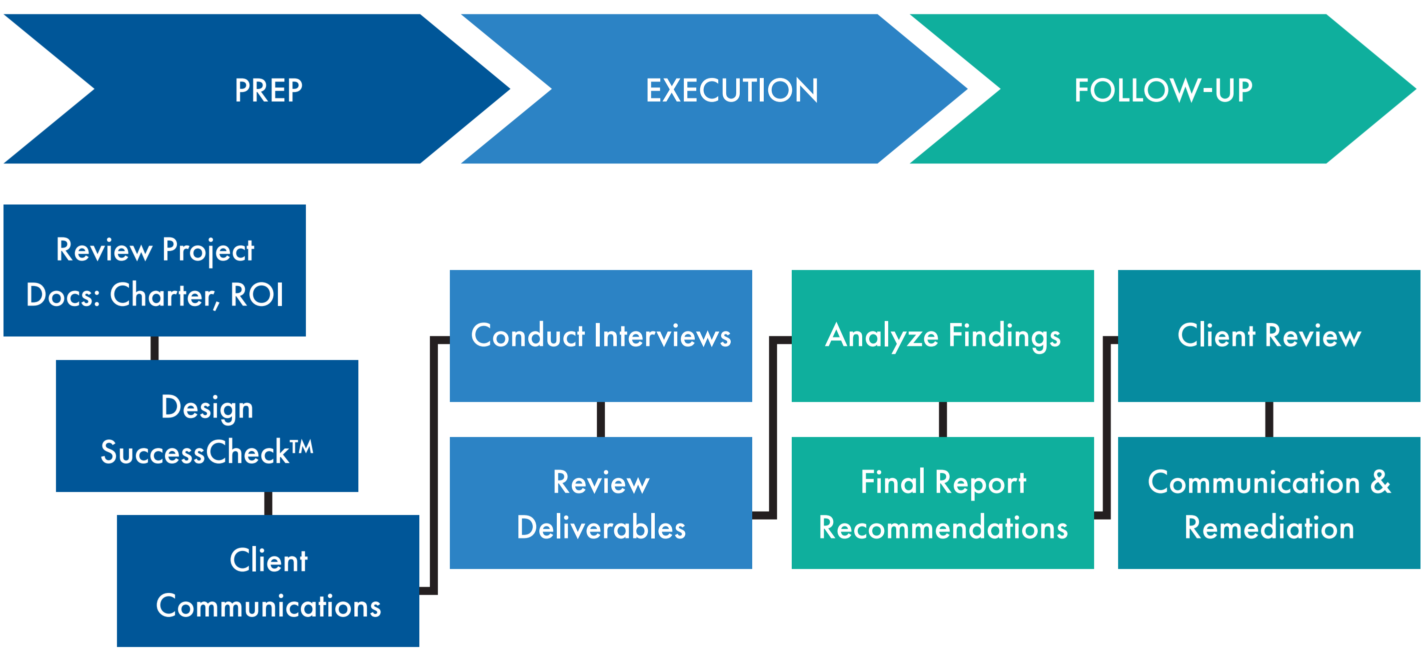
We often look at key project deliverables and make an assessment of the quality of those deliverables. *How well are they being executed, and are they in line with industry best practices?*

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 haven't 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, and 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, and 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 into the project? Are the sponsors visible and audible in support of the project? Is there an 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 set the stage for this to happen.

Another component of the process that encourages openness is the fact that we're 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.

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.

"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 Neilson, Co-Founder & Board Member, Clarkston Consulting

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 to 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 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 who 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're able to challenge these project teams and get executive sponsorship to convey the idea that unless the core issues are fixed, we'll all fall behind. This allows them to address the other project's challenges 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.

DO YOU NEED TO 'PULL OVER' AND CHECK UNDER THE HOOD?

We've been doing SuccessChecks for more than 30 years. 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're interested in finding out more, contact **Peter Tzefronis** at 404-915-2207 or ptzefronis@clarkstonconsulting.com.

ABOUT CLARKSTON CONSULTING

Businesses across life sciences, consumer products and retail industries partner with Clarkston Consulting to enhance strategic decision-making, improve operational efficiencies, implement new technologies, and promote business growth and market diversification. Leveraging deep functional and industry expertise, our people discover, design, and deliver solutions that fit your business, your goals, and your future. At Clarkston, your purpose is our purpose.

For more information about how we can help your company, please contact us.

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