

Prevaluate - A Tool To Achieve Tough Targets

John Brooker

If you have a tough target, how can your team increase the odds of achieving it? Here is a case study, where a team used a simple tool to do just that.

Our client was Programme Director of a multi million pound programme for a FTSE 100 company. Yes! And... facilitated a programme team workshop when he assumed responsibility for the programme and we were asked to facilitate the team's ongoing planning meetings.

The intent of the programme was to transform working practices, using a new IT platform to make better use of assets. The company had begun piloting the programme in one geographical region. To obtain resources to roll it out to other regions, it was vital that the pilot achieved the benefits the Programme Director had promised the Board.

This article illustrates step by step how we facilitated a tool using a Solution Focus Approach. It explains the issues that arose, how we dealt with those issues and the successful impact the workshop had on the programme.



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"I hope this works"

"These are frightening figures. Add the cost of failed projects that do not involve IT and the figure might be a horror movie. Who would want to be a Programme Director or Project Manager with those odds and potential losses?"

Introduction

"One does not have to be a mad scientist to travel in time"

Authors of research paper: "Back to the future. Temporal Perspective in the Explanation of Events"

"Only one in eight IT projects can be considered truly successful.... The cost of IT project failure across the EU in 2004 was Euro 142 billion¹." These are frightening figures. Add the cost of failed projects that do not involve IT and the figure might be a horror movie. Who would want to be a Programme Director or Project Manager with those odds and potential losses?

So, if potential failure were staring you in the face, would it be valuable to have a simple tool that can help you to make decisions and increase your odds of success?

This article describes such a tool and explains how you can use it with a team.

¹ "A study in Project Failure." Dr John McManus and Dr Trevor Wood-Harper. Source: British Computer Society website

Background

Our client was the Programme Director of a multi million pound programme for a FTSE 100 company. Yes! And... facilitated a programme team workshop when he assumed responsibility for the programme and we were asked to facilitate the team's ongoing planning meetings.

The programme's intent was to transform work practices, to use a new IT platform to improve use of assets. The company began a pilot of the programme in one geographical region. To obtain resources for roll out nationally, it was vital the pilot achieved the benefits the Programme Director promised the Board.

Consequently, the Programme Director was very focused on securing the benefits. He wanted us to help the programme team to develop a strategy to achieve that.

We suggested using the "Premortem" technique with our own additions to facilitate this.

We had first seen this technique described by Gary Klein of Applied Research Associates in an article in the Harvard Business Review². It is based on a concept known as "Prospective Hindsight."

² "Performing a Project Premortem" HBR 01 September 2007

Research on this concept³ has shown that people are able to generate richer and more numerous explanations of why an event might have happened, when told that the event has actually happened.

³ "Back to the future. Temporal Perspective in the Explanation of Events" Deborah J Mitchell; J Edward Russo and Nancy Pennington. <http://forum.johnson.cornell.edu/faculty/russo/Back%20to%20the%20Future.pdf>

The research looked at two aspects:

- Whether the outcome was determined as sure, ("It is a future date and we have not achieved the benefits)

- Whether the outcome was determined as unsure (“It is a future date and we might not have achieved the benefits”)

For some reason, people find it easier to generate reasons when the outcome is sure. (We suggest you review the research article if you wish to know of possible reasons why).

Once he understood the technique, the Programme Director agreed to use it.

Outcomes

We specified the outcome as:

The Group will have an action plan to ensure the programme team can achieve programme benefits.

Workshop Design Challenge

In his article, Gary Klein describes how he has people think themselves in to the future when the project has gone wrong and ask, “What went wrong?”

His process is to have individuals list as many reasons as they can, the project leader records these on a flipchart and uses them to find ways to strengthen the project plan.

We wanted the programme team to develop an action plan so we developed this process further. We also needed them to do it quickly because there were many other items on the agenda.

How to Use the Technique

Around eighteen members of the programme team attended the meeting. We gave this section the tongue in cheek name of “Predicting Benefit Fraud” and placed it at the beginning of the workshop to highlight its importance.

The team took around two and a half hours to use this process:

1. **We set up the situation...**the Facilitator (the author) asked the team to imagine it is 1 September (the meeting was in May) and the Programme Director has just been removed from the programme by the Board because the pilot had failed to deliver any of the promised cost savings or other benefits. The Board demanded answers! We positioned this in a humorous way to avoid negativity.
2. **We asked individuals to write reasons** why this had happened on a piece of paper. (You could use Post It notes for this and have people post them for review; this saves time when collecting ideas, but adds time on for culling duplicate ideas).
3. **The Facilitator recorded the reasons** taking one idea per person and wrote them on flipcharts until the team’s ideas were exhausted. We collected 45 separate reasons in total.
4. **The group prioritised the reasons** using dot choice (four

dots per person). You may find it useful to consider the criteria in advance e.g.:

- What is most likely to happen
- What would prevent the team achieving the largest benefits

The following were priorities:

Reason	Rate
Unable to measure benefits accurately as too difficult to measure and attribute to programme	12
Didn't identify further benefits	8
Didn't communicate and embed the cost savings into personal / Group objectives	8
Didn't measure frequently enough - no time to take action	6
Business identifies negative costs and counts against programme	6
Data was ignored	5

Table 1 Example reasons



"Aah, looking back it all seems so clear to me now"

5. After allocating reasons to small teams, **the teams created actions** to ensure that the top priority reasons did not happen. They answered the question, “What must we do instead?” to ensure the programme would reap the benefits. This question encourages a solution focus.
6. They also **identified the resource the programme team needed** to take the action, so that they could factor this in to the overall programme resource plan.
7. Each team **shared the actions and resource requirements with the group**. They asked if there were any issues with their plan and received constructive feedback. The group added further actions to some of the plans.

After the meeting, we **captured all the output** in a report so that everybody was clear on what was said and done.

Benefits of Using the Technique

The exercise:

- Ensures everyone in the group is fully involved – nobody can say later, “I knew that would happen and that it would fail!”
- Reminds people of the programme outcomes, which provides motivation
- Makes the whole team aware of the potential pitfalls so they can support individuals to avoid them

- Identifies and mitigates the risk in advance, which is a lot less stressful than dealing with problems later
- Enables the team to allocate resources to prevention, which uses less resources than dealing with a fire
- Helps build confidence on the programme team, they know the likely issues and can plan to deal with them
- Can be used with different audiences. For example with the Board, or with customers.

Outcome

Talking to the Programme Director after the September Board Meeting, I asked him how it had gone. He was delighted and so were the Board Members. The team had implemented the actions to secure the benefits and the programme pilot had achieved double the benefits expected.

Whilst we would not claim that using this technique was responsible for all of that, it certainly helped!

Conclusion

One aspect of the technique we thought could be enhanced was the name. Premortem is logical but has shades of gallows humour, so we now call it “Prevaluate”.

Whatever you call it, this technique is a very useful tool that provides a number of benefits with little or no disadvantages, other than the time taken to carry it out.

With the information you have here, time and some facilitation skill, you can facilitate the technique yourself.

Some people might argue that to make it truly solution focused you should ask teams to “*imagine that the pilot has reaped all the benefits and more; what have you focused on to achieve this?*” We agree that this can work. However, asking people to identify what went wrong allows them to vent their concerns. If positioned in a humorous way it can be a fun exercise and so become energising.

We suggest you try it both ways and see which works better for you!

END

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