Gain Agreement on Project Metrics Ahead of Time

My last meeting of the year was with Heather Cruise. Heather pulled me aside at the annual Christmas lunch to ask if I could attend a project conclusion meeting with her later that week.

Heather was assigned to a project for the Finance Division after the previous project manager resigned. The project was already experiencing some problems, which was probably a factor in the previous project manager leaving the country. It had been a tough spot for Heather, but she had done an admirable job in bringing the project to completion. The solution was finally implemented, but there was still some question as to whether the project was successful or not. I attended the project
conclusion meeting, and I could tell it didn’t go as Heather expected. She came prepared with a set of metrics to show that her team was somewhat successful on the project, but the business client didn’t accept her metrics at face value. Afterward, we talked in her office.

“Heather, it appears there was a difference of opinion on whether the project was successful or not,” I began. “I first wanted to compliment you. You attempted to initiate a fact-based discussion to show the state of the project. Why do you think it didn’t work out the way you planned?”

“There was a lot of emotion built up over the course of the project,” Heather replied in a serious tone, her eyes widening. “I came into the project late and didn’t realize the level of dissatisfaction some of the clients felt with the previous project manager. Since there was so much emotion involved, I tried to bring the discussion around to some fact-based metrics.”

“It sounded like the client was challenging the validity of some of your numbers and whether they were relevant,” I noted. “For instance, you said the project completed on schedule, but the client said the solution was implemented without adequate testing.”

“That may or may not be the case,” Heather countered defensively, shaking her head back and forth. “We all agreed we would implement on the revised deadline date and fix any problems on an ongoing basis. Having agreed to that decision, I don’t know how they can complain about the project being late.”

“Yes, but the client said they were pushed into that decision because they could not afford to miss this monthly financial close cycle,” I noted. Heather was about to respond, but I realized the current line of reasoning wasn’t going anywhere. Nor should it, since it wasn’t the general lesson I was trying to teach.

“Heather, let me stop you for a minute. You have the right idea about the importance of project metrics. If you measure the right characteristics of your project, you will be in a much better position to improve your processes during the project and have a fact-based discussion about overall project success or failure. But your metrics seemed to be designed to show the project team in a more favorable light. You also missed a very important part of project success metrics—you must gain agreement with your client ahead of time.”