PM POWER CONSULTING
Be Agile. Stay Ahead.

proFes360™

Set-up and Usage Guide

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Objective of this presentation

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- To help set-up and execute project health assessments using proFes360™
- Primary target audience: people who initiate the project health assessment, called Assessment Administrators (AAs), typically a Project Manager or a Delivery Manager in the organization performing the project
- Pre-requisite: You should have viewed the proFes360™ Overview video available at this link

Using proFes360™ – an overview

- Light-weight process
- Minimal preparation
- Simple set-up by the Assessment Administrator (AA)
- The questionnaire takes about 15 minutes per person to complete
- The whole exercise can be completed in a day if all identified stakeholders are available to answer the questionnaire

Preparation: Pick the projects for assessment

- Projects can be Agile or non-Agile
- Projects should be release-based work (say, enhancements + fixes or product development) with planned start and end dates
- Pure KANBAN type of engagements or reactive support work are not good fits
- Project health can be assessed at any stage but the best value is derived when the project is between 25% - 75% of the planned project duration so that
  - the stakeholders have developed a sense of project health
  - sufficient time is available to identify and implement improvement actions and see results

Preparation: Identify the respondents

- You would recall from the proFes360™ Overview video that there are four categories of stakeholders: Customer, Project Team, Project-in-Charge and Delivery Management
- Scrum Masters and Product Owners are typically considered as team members (TMs); Project-in-Charge (PIC) is the person to whom the team reports up to; in smaller projects, a Project-in-Charge may also be a team member (called a dual role, PIC + TM which, if so, should be specified as such later, during proFes360™ Project Set-up)
- There could be one or more respondents under each category; for example, you could have two customers responding, say, the customer's IT Manager and the Business Sponsor representing the end users
- No stakeholder category is mandatory; for example, you could conduct an assessment with no customer-side respondents but you would be foregoing the benefit of a crucial perspective / vantage point; also the proFes360™ forecasts would inherently have a lower confidence level if one or more of the four categories of stakeholders (above) have no planned respondents
- You could have your own Account Manager act as a proxy for the actual customer and respond to the questionnaire; but that is a distant second choice to having the actual customer herself respond
- All the project team members need to be included as respondents regardless of role, tenure, seniority, full-time/part-time, employees/contracted staff etc.

Preparation: Brief the respondents

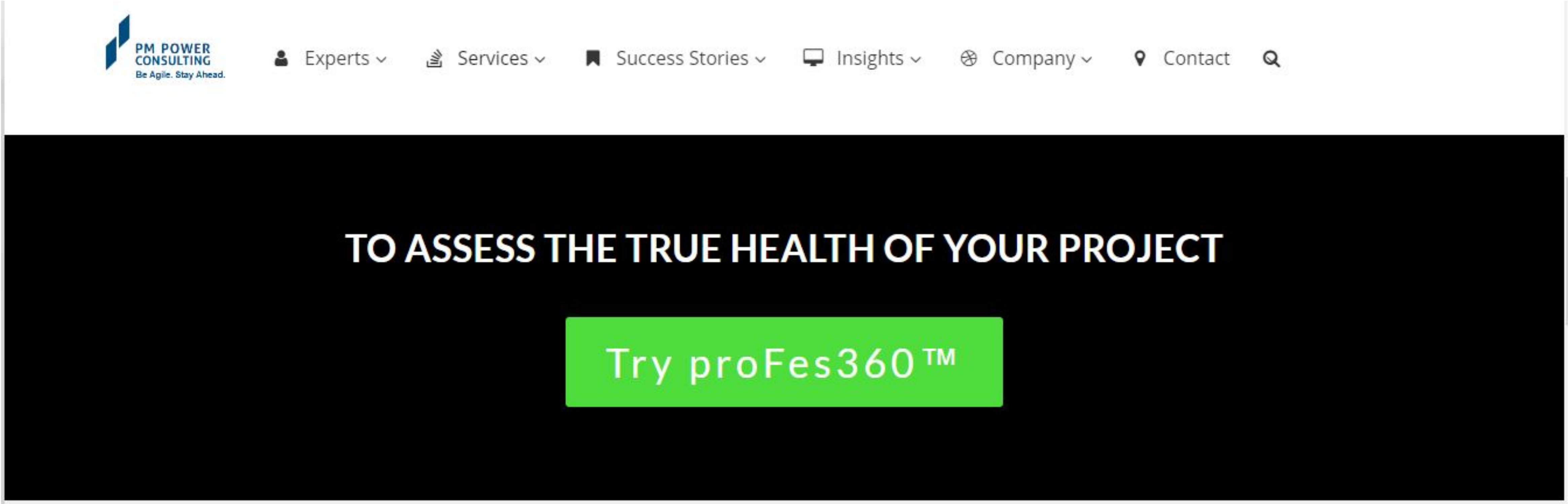
- Share the proFes360™ Overview video with respondents
- Make them aware of PM Power's End User License Agreement for use of proFes360™
- Emphasize that their questionnaire responses are held in strict confidence by PM Power; PM Power shares only aggregated data with customers / users of proFes360™, never individual responses
- Ensure that each respondent knows her role to be entered while filling out the questionnaire - choosing one among PIC+TM (dual role, if applicable), PIC, Team Member, Customer or Management

Preparation: Understand the questionnaire

- You and all the respondents need to understand the following:
  - All questions are mandatory for all respondents
  - However, some questions may be marked as “Not Applicable” by you during Project Set-up (more on this later) and respondents are not required to answer them
  - Each question is to be responded with a score of 0-10; 0 = Cannot Say / Do not know, 1: Strongly disagree; 10: Strongly Agree
  - Ask the respondents not to “over-think” the questions and their answers; they are providing their “sense” and their responses should be spontaneous
  - Although the respondents can respond “Cannot Say / Do not know”, they should be advised to use it judiciously only when they truly lack the “sense” to respond more definitively

Preparation: Sign up

You start the sign-up by clicking “Try proFes360™” link



Preparation: Sign up…

- ProFes360™ prompts you for the following information
  - Mail id
  - Name
  - Organization
  - Designation
  - Acceptance of the End User License Agreement
- When you SUBMIT, a link will be sent to your mail id to set-up the project for health assessment

Setting up the project

- Most of the fields in the set-up form are simple enough and need no explanation; if needed, you can refer back to the proFes360™ Overview video for queries or send a mail to profes360@pm-powerconsulting.com for assistance
- A key field in the set-up form is the closure date for the questionnaire; all respondents are expected to complete it before this date; responses received after this date would be ignored
- Set the closure date to no more than 2-3 working days from the date of set-up; after all, we are seeking to get a “snapshot” of project health at a given point in time
- When you SUBMIT, you will receive a mail with a link to the assessment questionnaire; you need to forward this mail to all identified respondents

Setting up the project…

- We believe all questions in the questionnaire are applicable to all projects
- However, while setting up the project, you, as the Assessment Administrator, do have the option to mark certain questions as “Not Applicable” in the context of your organization / projects
- Examples of potential “Not Applicable” questions:
  - Does the team plan delivery considering prior commitments made, if any (e.g. contracts, legal agreements, verbal agreements)?
  - Is the product development based on a sound architecture?
- We recommend that you mark as few questions as possible as “Not Applicable”; ideally zero, once you understand the intent behind the questions

Administering the questionnaire

- Once you have forwarded the mail with the link to the questionnaire to all identified respondents, they can take it any time
- Respondents need to answer the main set of questions as well as what we call as "calibration questions"; these are seven in number and ask the individual her sense of achieving each of the seven project outcomes; this enables comparison with the actual forecasts arrived at by the tool and investigation of differences, if any
- During the time the questionnaire is open (say, 3 working days), you would get periodic mails from proFes360™ on how many respondents have completed the questionnaire and how many are pending; use this information to follow up and make sure that people do indeed complete it before the closure date

Analyzing & generating reports

- The Assessment Administrator will receive the report from proFes360™ the day after the closure date specified at the time of project set-up
- The reports is a PDF file which is automatically mailed to you (note that the report is sent only to the Assessment Administrator)
- You can then share the report with all the respondents

Driving improvements based on proFes360™ reports

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- It is recommended that the project team (and other stakeholders as needed) does a deep dive on the improvement areas identified by proFes360™ and identify actions. Plan-Do-Check-Act cycle is a proven approach to drive major process improvements
- Specifically, the team needs to review the report in terms of
  - Red-Amber-Green status of project outcomes
  - The top forecasts for the project
    - Qualifiers in the forecast indicating areas of improvements
    - Disconnects pointing to gaps in stakeholder perspectives with reference to outcomes and practices (refer to proFes360™ Overview video on components of a forecast)
- The team can then take up the identified improvement actions based on the above
- You can take another snapshot of project health after a period of time to see if desired improvements have resulted; the cycle can be repeated as many times as desired during the course of the project

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End: Set-up and Usage Guide

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