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Recovering troubled programmes (part 2)

July 6th, 2009

Are you seeing any of the problems faced by troubled programmes that I talked about last week? If so, you need a recovery plan to get your programme back on track.

Here's the 5 step ESI process for getting out of trouble. The whole approach assumes you have been parachuted in to fix someone else's flailing programme, which I suppose is what ESI do. You can adapt the steps if you are trying to turn your own programme around, or make the steps smaller to turn around a project instead of a whole programme.

Assessment Phase

Step 1: Define Charter

Duration: 1-2 days

This formally sanctions the existence of an assessment and recovery effort. It provides the assessment and recovery lead with the proper authority to complete the activities necessary to develop an assessment plan.

Define the charter with the sponsor and steering committee. The charter should cover:

- Programme history and sensitivities (although I wouldn't write all this down)
- Assessment approach: how many people are you going to interview, in individual meetings or in group sessions etc.
- An action plan with dates

Then get it all agreed – which is what the charter is for. In this step you would also initiate contact with the programme and project teams.

Step 2: Develop assessment plan

In this step you aim to achieve the objectives of the charter. This allows the assessment team to perform their assessment quickly, ensures accurate findings, and minimises distractions for the project team. After all, you want to keep going with things that are progressing well.

- Establish a team
- Review and analyse the assessment model (how are we going to review documents, how are we going to move forward with analysis)
- Review critical documents
- Develop assessment plan

This is a formal step, so get the plan signed off.

Step 3: Conduct assessment plan

Duration: 2-5 days

In this step you determine the true current status of the programme and constituent projects. You identify major threats, opportunities and problems. You begin to consider the recovery as well as who would be on your recovery team.

- Establish a war room
- Assemble the team
- Implement the assessment plan (interviews and document review)
- Aggregate and rank-order the findings from the most problematic to least problematic
- Validate, update and finalise findings with programme team and sponsor

Recovery Phase

Step 4: Develop recovery plan

This step leads to a plan to get to a functioning programme. You establish a road map and process to achieve the goals, and continue to build confidence and morale.

Prepare a plan that everyone sees as realistic and achievable: this helps build confidence. There is no Plan B for this recovery plan: this is it! The goal is to save the programme from loss and restore it to usefulness, preventing total failure along the way.

- Produce an achievable schedule
- Re-establish customer management confidence
- Negotiate a new baseline

Step 5: Conduct recovery plan

In this step you execute your recovery plan to return the programme to usefulness. You validate estimating methods and their accuracy. This allows you to produce an accurate forecast of programme completion. Begin with the end in mind: a programme that is no longer in recovery.

[You can watch the webinar yourself here \(registration required\).](#)

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I actually have a customer who has their own Business Rules tool that follows very similar steps when a Business Rule changes.



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