

Basic Components of Taking Over a Project – Before You Take Over

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Context

Taking over a project; if you are saying to yourself that there is no way you will ever take over a project, think again. At least think twice if you are a PM that delivers results with an established reputation based on relationships, as well as, doing what you say you will do with integrity. If you fall into this category people not only want you, they need you.

I can honestly say that the very idea of taking over a project was not my notion of fun. It is much better to have the opportunity to start a project from scratch knowing you have accounted for everything you need to; no legacy issues to contend with. To pick up from what someone else has done is challenging and risky; even worse, taking over a “troubled” project!

However, as my career has progressed I actually found myself anticipating the opportunity to take on troubled projects, not as the norm, more the exception. Why such an insane change of perspective? Simply, what better way to challenge yourself than to take on an opportunity to turn a situation around, as well, to put true leadership to the test by taking ‘calculated’ risks.

Of course, not every situation is one that you should jump on. You need to weigh the pros and cons and either run for the hills, or jump in with both feet. Be sure that some situations are a no-win for anyone and it is absolutely okay to run.

The following is intended to provide some ‘basic’ awareness of what you need to account for in deciding to take over a project, as well as, the approach to employ when taking over a project.

Evaluating the Opportunity

First, before you do anything ensure you have context for what the project entails. Review project artifacts such as a Project Charter / Project Data Sheet. If these types of documents don’t exist you have your first red flag.

Assuming that the project is of interest, and before you commit to taking on a pre-existing project, you need to ensure you understand the variables that contributed to you being asked to take it over. You also need to understand the variables that exist in the execution of the project. Once you have assessed both you then assess yourself to determine if there is a fit.

Stage 1, Understanding the Variables

The following is a sample exercise to consider leveraging in order to understand the key variables of the project state:

- 1) **Interview the primary Stakeholders / Sponsors to understand their perspective on the change.** You want to understand if the change was a result of lacking performance, miss-aligned expectations, lacking capability, personality conflicts, or other. You also want to understand what they see as being the good and the bad with overall delivery, as well as their view on what the scope of delivery is.

Before asking any questions be sure to set the tone by stating you are simply assessing what gaps may have existed so that you have a solid sense of where you would need to focus. As well, don't lead your questions; simply ask for a brain dump of their views on the situation.

What you want to get a sense of is whether or not the Stakeholders / Sponsors have a 'constructive view' of circumstances. Or, if they have a view that comes across as being condescending, disrespectful, or one-sided with respect to any issues they call out. If issues are raised ask what steps they took to address them. You want to assess if there was proactive and direct engagement, or, assumptions and reactive engagement.

If through this exercise you find there was a disregard for the prior PM, lacking respect about them as a person, and no real tangible engagement to rectify issues proactively, it is at that point you want to consider the project a no go. An important key to being successful is having positive 2-way engagement between the PM and executive.

- 2) **Interview a few key project resources, or leads, to understand their perspective on the change.** I only recommend doing this after you interview key Stakeholders / Sponsors. If the result of those discussions is negative there is no value in interviewing the project team. Otherwise, follow the same line of questions as with the Stakeholders / Sponsors. Additionally, ask for their view on how key project processes are working, e.g. Change Management, Communications, Planning, Change Control, Budget, Schedule, etc.

As with step 1 above, if you find there was a disregard for the prior PM, lacking respect about them as a person, and no real tangible engagement to rectify issues proactively, it is at that point you want to consider the project a no go unless you have opportunity to change the composition of the team. If the results are bias neutral, and it is more a case of troubled processes, and/or skill gaps, you may want to consider taking the project on.

- 3) **Interview individuals external to the project team, but who are impacted by it, to understand their perspective on the change.** I only recommend doing this after you interview key Stakeholders / Sponsors as well. If the result of those discussions is negative there is no value in interviewing at this level. Otherwise, follow the same line of questions as with those you interviewed from the project team.

Again, if through this exercise you find there was a disregard for the prior PM, lacking respect about them as a person, and no real tangible engagement to rectify issues proactively; it is at that point you want to consider the project a no go unless you have opportunity to change the composition of the team.

- 4) **Interview the prior PM.** This opportunity may not exist if that person has already been let go, or, if there are organizational sensitivities. However, if possible you want to get as many insights on the good and the bad of the project, as well as what is still pending to complete the project. Again, you need to be careful to avoid leading questions, as well as apply caution if responses are biased negatively.

In this way you can compare perspectives of the PM against inputs from other interviews to hopefully attain an overall view of conditions.

- 5) **Review any available project metrics.** Where is the project at with regards to budget (plan vs. actuals) and remaining work? What is the trending as it relates to missed deadlines and milestones? What is the resource turn-over rate? Although not a metric, is there flexibility to address any budget, resource, or schedule shortfalls? Or, is the mandate to deliver original scope against original plans?

Understanding these elements will aid you in understanding what you are up against. If there are severe shortfalls with little or no trade-off opportunities you will want to think twice. In severe situations senior management may simply believe that a new PM is the 'Silver Bullet' and the rest will work out. Unless there is openness to look at all options you will be setup for failure.

Once again, the purpose of this exercise is to solicit as many inputs as possible to build a sound picture of the environment you would be walking into.

Stage 2, Assessing the Opportunity

The next stage is to evaluate and assess conditions against your personal capabilities and circumstances.

Step 1) Ensure you have full context for the project (scope, resources, schedules, budgets)

Step 2) Consolidate and assess the outcomes from the interviews.

Step 3) Assess your understanding of the project and conditions by asking:

- If you have domain knowledge and experience needed
- If you have experience in addressing any gaps identified
- If you will be in a position of empowerment
- If you will be in a position of influence
- If you have the soft skills to manage project personalities
- If you have the desire, interest, PM capability, and patience

You need to know what you are getting into, what is needed of you, what is needed of the project, and what is needed for the project. From this you can then determine if taking over a particular project is in your best interest.

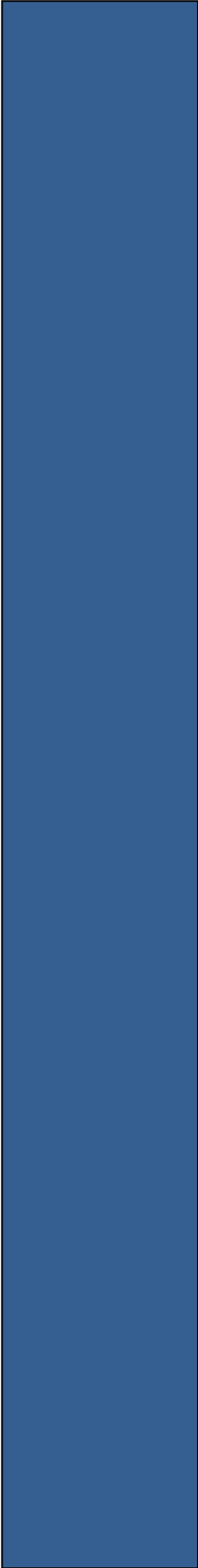
You do not want to take on a project where the probability of failure is close to certain. You need to be mindful of both your professional reputation and that of the organization as it relates to your capability to deliver.

In Summary

Make sure you are honest with yourself and have an understanding of conditions before committing to a project. The project may be delivering something that would look great on a resume, but unless conditions exist that would allow you to deliver successfully, don't allow temptation to rule logic.

Now, you may be saying to yourself this is all good if I am contracting, but what about full-time employees who may not get a choice? Although this is a reality for many, you should still do your due diligence. Interview people in the same way, review project documentation to attain full context for the initiative, and then assess.

From this you can at least document existing issues, challenges, risks, and project requirements to ensure success. Have your sponsors and stakeholders review and sign-off. At minimum make sure they are aware of your assessment and communicate widely. Now you can manage expectations and have something to go back to if challenges arise relating to your assessment.



As a final note, when you do commit to taking over a project there are a couple key activities you will want to address as soon as you on-board:

- 1) Review project roles and responsibilities, ensure they are clearly defined
- 2) Pull together all project documentation. review, update, publish
- 3) Review prior commitments and deliverables; ensure all align to plan and adjust plans and expectations accordingly
- 4) Establish clear lines of direct communication with your Sponsor and Stakeholders
- 5) Corral the troops:
 - a. Set expectations relating to team and external communication approaches
 - b. Set expectations on team play
 - c. Review schedule and tasks; ensure ownership, hand-off expectations, constraints
 - d. Review roles and responsibilities with team; ensure awareness and address issues
- 6) Employ continuous team check-points (coordination reviews, standup status reviews, etc.)