

DO YOU REALLY KNOW THE CURRENT STATUS OF YOUR PROJECT?

A project check
for project sponsors



Projects can go off the rails long before the first warning light in the project report turns red.

If you want to know the current status of your project, you really only need to answer one question: will the project achieve its goal within the planned timeframe and budget?

Is it really that simple?

The simple starting point

Our question is not about how to make a project successful, or how to get it back on track if necessary, or who is responsible for deviations or problems. We are deliberately leaving these questions aside for now. Because the more questions we ask, the more they obscure our view of the issue at hand. That is why we are focusing here solely on the question of how you, as the project sponsor*, can recognise whether the success of your project is at risk or not.

There are methods and techniques, as well as literature and manuals, available to answer this question. Every professionally managed project provides status updates and is integrated into a reporting process. For larger projects, in addition to the risk management carried out by the project leader, there is also an independent quality and risk manager.

If, as a project sponsor, you already receive documentation from these sources that allows you to know (at any time) the status of your project, then you need not read any further. There is nothing more here that would be of use to you.

However, if you are one of those sponsors who occasionally receive imprecise or inconsistent documentation, if you are confronted with complex reports, confusing traffic-light systems, graphs and tables whose volume and layout tend to confuse you rather than provide clarity, then it might be worth taking a look at the following lines. We do not intend to reinvent the wheel here; we simply want to help you sharpen your focus on what really matters.

**Note on gender: The terms used in this text refer equally to all genders. Dual forms have been omitted solely to ensure optimal readability.*

The Dilemma:

project sponsor and manager in one

Many project sponsors do not look at the status of the project for which they are responsible more than once or twice a month. Their focus on the project becomes somewhat more intense when things have already gone off the rails or perhaps when a steering committee meeting is due. This relative distance is usually due to the fact that project sponsors, by definition, are managers within their parent organisation. As such, they have their core duties to fulfil there, which usually already take up more of their time than is available. Being a project sponsor is an additional role.

There are various approaches to overcoming this dilemma: delegated project sponsors, external controllers, project and portfolio offices.

However, these approaches do not relieve the sponsor of his responsibility. A responsibility that they must fulfil personally.

In fact, additional roles often make it more difficult to fulfil:

- The sponsor is no longer informed directly at first hand.
- Quality managers or those responsible for controlling draft reports or overviews based on how they have interpreted the information from the project. However helpful and important 'external' support for project management may be, an additional layer of communication leads to a loss of direct connection and the risk of misunderstandings.
- For many sponsors, the technical and specialist terminology of the project subject matter and project management presents a challenge. If the project status is then further processed – with good intentions – using risk management and reporting techniques and terminology, this may be helpful for those who deal with this subject matter daily. However, it tends to make understanding more difficult for a project sponsor who primarily performs other management tasks within its organisation.
- The equally well-intentioned aim of describing facts accurately and in detail quickly leads to the essential points being lost in the volume of information in situation reports.

INCIDENTALLY, THE MATTER IS NOT MADE ANY EASIER BY THE FACT THAT SPONSORS ARE OFTEN RESPONSIBLE FOR SEVERAL PROJECTS AT THE SAME TIME.

Approach

A preliminary remark: existing controlling and reporting processes should not be (rapidly) scrapped. It is better to continue with what is already in place and make targeted use of it. If, over time, it becomes clear that the sponsor has their project under control, superfluous elements can be reduced and phased out.

In most cases, it will not be possible to allow the project sponsor enough time to deal intensively and comprehensively with all aspects of their project(s). Fortunately, when it comes to our initial question – whether the project will achieve its goal on time and within budget – there is usually a knowledgeable source of information: the project leader.

It may be that the project leader fails to recognise any acute risks, for example because they may not want to admit them or because they are too close to the matter at hand. Even in such situations, where the project leader misjudges the facts, they usually have the necessary information at their disposal.

This brings us back to the status reports mentioned earlier, which are drafted by the project leader for the sponsor's attention. If they are clearly written, contain all the essentials and are correctly understood by the sponsor, our problem is effectively already solved. Unfortunately, however, there are always obstacles and pitfalls. Below, we provide some tips on how to avoid these pitfalls.

THERE ARE A FEW PREREQUISITES AND SOME CHECK QUESTIONS FOR CARRYING OUT A PROJECT CHECK QUICKLY AND EASILY.

Prerequisites for a project check

If the project check is carried out by external parties, it is their responsibility to ensure the necessary prerequisites are in place. If the sponsor carries out the check themselves, they must be aware of the following requirements.



Direct contact between project leader and the sponsor

The project sponsor and the project manager must have direct personal contact. Over time, this contact may be reduced to telephone consultations. At the very least, at the start of the collaboration and during an initial project check meeting, the individuals must speak to one another face-to-face.



Mutual trust

Closely linked to personal contact is the requirement for mutual trust. The project sponsor and the project leader do not have to like each other. However, they must trust one another and be able to rely on each other's statements. As soon as the project sponsor has (justified or unjustified) doubts about the capabilities or sincerity of the project leader, they must take action. This action may involve, in the best-case scenario, building trust, or in the worst-case scenario, replacing the project leader.



The project sponsor must understand 'everything'

He must know and understand all the facts that are relevant to the success of the project or that pose risks. This is not about technical or methodological details, but about the substance of the project situation. Therefore:



It is the project leader's responsibility to present the information in such a way that the sponsor understands the explanations. Simple language with clear statements is required. Unnecessary details and confusing terms must be omitted.



It is the project sponsor's responsibility to keep asking questions and insisting until they have understood the relevant facts.



Take early warning signs seriously

The sooner potential problems are identified and addressed, the better the options for responding.



No miracle is going to happen.

The four check areas

ACHIEVEMENT OF OBJECTIVES

This question is not about the frequently required project and process objectives, which must be clearly documented and assessed according to SMART criteria. When carrying out a quick and simple check on the status of a project, it is important to find out whether those involved know what the objective and the benefits are. What is meant here is the project's 'raison d'être'.

Check questions for goal achievement:

- Were the stakeholders involved in defining the objectives (project brief)?
- Is this objective known and is it understood in the same way by all stakeholders?
- Do all stakeholders have a keen interest in achieving the objective?
- Are there any signs that achieving the objective is at risk? If so, why?

MEETING DEADLINES

Whether planned deadlines have been met can only be determined if there is a schedule containing deadlines and if adherence to these deadlines can be verified. Scheduling is not an end in itself, but generally serves to structure a project and coordinate the approach. The information required for a status check should therefore already be available and not have to be generated or updated specifically for the check. In addition to the overall deadline, there are usually interim deadlines, for example for sprints, phases, deliverables, etc.

For a quick check, the following questions arise:

- Has the project's end date been adjusted since the start?
- If so, how often and in what stages?
- Was the previous interim deadline met?
- If not, when, how often and in what stages was it adjusted?

- Is the next milestone expected to be met?
 - Has the next milestone been adjusted since the initial planning?
 - When, how often and in what increments was it adjusted?
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- Are delays to be expected (from the project leader's perspective)?
 - As the sponsor, are you aware of the project's 'critical' path? Put simply, this means: which schedule changes have a direct impact on the project's end date?

BUDGET COMPLIANCE

As with deadlines, budget compliance can only be checked if a budget has been set in the first place. For the sake of simplicity, the term 'budget' here refers to all resources collectively. In addition to financial resources, this includes human resources.

- Is there an idea of what resources are needed to implement the project?
 - Is the resource estimate plausible considering the project objective and the schedule?
 - Are the necessary resources available or secured in terms of both quality and quantity?
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- Have there been any adjustments to the estimate of the required resources since the start of the project?
 - If so, when and in what stages?
 - Have the resources deployed delivered the planned and expected results? (Key terms: "Earned Value" or "Burndown Chart")

COLLABORATION

Project successes are made by people. Projects fail because of the people involved. This truth is particularly significant when reviewing a project, especially regarding the interaction between the sponsor and the project leader. As mentioned, mutual trust is one – if not the most essential – prerequisite for understanding the status of the project.

- Have the project leader's statements to date been accurate and reliable?
- This is not about error-free forecasts, but rather whether the project leader has, consciously or unconsciously, asserted facts that have turned out to be incorrect?
- Have risks materialised that the project leader believed could be controlled?

- Have risks materialised that had gone unrecognised?
- Are you hearing conflicting opinions about the status of the project?
- Have all stakeholders directly affected by the project been identified?

Usually, the project sponsor can answer this question themselves.

Required background information

In addition to direct contact between the sponsor and the project leader, carrying out a project check requires basic information to answer the review questions. This information should already be available in any professionally managed project and should be in written form.

- Definition of the project objective and any updates
- Original and current schedule
- Original and current budget (human and financial resources)
- Stakeholder overview providing a clear picture of the individuals or groups directly or indirectly affected by the project, and how they are or should be involved in the project.

Conclusion

To assess the health of a project, it is sufficient to start with a few targeted questions. Depending on the answers, further questions arise, and so on, until a clear picture of the project's status emerges. The sponsor's instinct and gut feeling in recognising all 'warning' signs guide this process. This is part of another essential aspect of projects: leadership.

Do you really know the current status of your project?

Projekt-Atelier offers you a free initial consultation, with no obligation and clear assessments.

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About Projekt-Atelier GmbH

Based in Bern, Projekt-Atelier GmbH provides comprehensive support to companies in project management — from overall project management to independent consultancy on an ongoing project. With a long experience in the IT sector, Projekt-Atelier prepares the basis for decision-making and identifies risks and opportunities — regardless of whether you use a traditional or agile methodology.

Our services: project management, quality and risk management, consultancy, coaching, team building and the establishment of project portfolio management.

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