Top 10 Key Attributes of a Successful Project

For many years Deltek has worked together with professional services organizations to implement their business solutions. This collaboration has given us insight into all the pitfalls and risks that are worth being aware of when working on large projects.

Below are a number of subjects and recommendations concerning these top 10 key attributes of a successful project. These 10 items are essential when an organization is launching or considering a large project.

- Executive sponsorship
- Strong Project Governance
- User Involvement
- Clear Company Goals
- Well-Defined Project Charter
- Well-Defined Base Requirements
- Proven Methodology
- Application Software
- Experienced Project Manager
- Experienced Resources

This is a good check list to use for matching thoughts and expectations among the team members when establishing and executing projects.

The description is our recommendation for how a project should be executed. We furthermore recommend that these items – and how they should be managed – are discussed among project managers during the initial phase of the project as well as on the first steering committee meeting. If this is done and if a common recommendation for the handling of the project is provided by the project managers of the client and the vendor, respectively, the project and its execution will be considered more as a partnership rather than a traditional client/vendor relationship.

Below, we have based our recommendations on a case in which an organization wishes to replace its current business solution. The organization therefore faces a great task and change. The organization has initiated this project in order to strengthen ownership and responsibility across the organization. Furthermore, the organization aims to streamline operations, e.g. when it comes to project management and revenue.

One: Executive Sponsorship

Description:
The cornerstone of any successful project revolving around the business solutions of an organization is to put the executive team of both client and vendor in charge of the implementation. This is partly because the project will affect most of the employees and also because the support from the executive team is crucial in order to enable effective change management. In many projects, the executive team forms both management and daily line management.

Executive sponsorship must:
- Facilitate communication of the project objective and the reason for launching it
- Motivate the affected parts of the organization to take part in the project and to adapt to new and changed routines
- Ensure general support to the project managers as well as support of the decisions and changes which some employees consider to be adverse
Risks:
If the project is not 100% supported by the various parts of the organization, it will not be possible to change habits and behavior across the organization. This could very well cause the organization to fall short of achieving project goals.

Risk aversion:
The most important parameters are communication, visibility and participation within the steering committee as well as relevant project meetings and meetings regarding the functional areas. The participants must be active and the individual meetings must be given high priority. Furthermore, a clear communication strategy must be prepared with emphasis on the areas that require modified behavior or new habits.

We recommend:
- A highly relevant steering committee composition
- High awareness of the importance of change management
- That e.g. the CFO or COO is appointed chairman of the steering committee
- That project managers are granted direct access to the steering committee
- That a communication strategy is prepared and presented to the steering committee at one of the first meetings
- That an internal executive within the organization is given responsibility for change management

Two: Strong Project Governance
Description:
In every implementation project it is important to ensure that all project managers are working efficiently towards the same goals and that they all stay within the charter of the project. In large projects with greater complexity and a large number of project team members, it is important to have fixed project follow-up procedures.

This is to ensure satisfactory project progress and identify any deviation from the plan.

Risks:
If no project follow-up procedures have been established, there is a risk that deviations such as deadline overruns, scope creep etc. are not spotted in time.

Risk aversion:
In the project charter it should be determined how to follow up on the project. It is recommendable to establish the frequency of steering committee meetings, project management meetings and project team meetings right from the start.

One of the steering committee’s tasks is to ensure the right project charter. This not least includes access for the project managers to give greater priority to deviations from the plan as well as any issues which should be addressed at the management level.

We recommend:
- That project managers meet on a regular basis (e.g. weekly but as a minimum every two weeks)
- That steering committee meetings are held on a regular basis (e.g. monthly)
- That a project charter document is produced and thereafter approved by the steering committee
- Fixed procedures for the project
- A solid project method and usage of related project documents.
- Deltek uses its own method which is aligned with widely recognized international project management methodologies, and dedicated to the implementation of a standard system with extensions, including templates for reporting to the steering committee.
Three: User Involvement

Description:
In order for the project to be successful, it is crucial to involve relevant user representatives in the entire implementation process from the analytical stage to testing and training and finally the go-live stage. The purpose is:

- To ensure that users with the greatest knowledge of the individual processes are involved in the design of the solution which comprises these processes. This is one of the most important methods to ensure high quality of the solution as well as making processes and functions tangible.

- To ensure that the organization is staffed with a number of employees acting as ambassadors for the new solution.

Risks:

- The allocated employees cannot be sufficiently freed from other tasks.

- Users are selected on the basis of other criteria than qualifications and skills (e.g. who has got the time). It is important to select users who wish to participate in a change process, who have the necessary skills in relation to their field/functional area and who are respected internally.

Risk aversion:
It is recommendable to enter into an explicit agreement on how to handle the tasks from which the allocated employees are freed. When the employee and the line management involved commit themselves to such an agreement, it reduces the risk of having the employee perform double work with deteriorating quality as a result.

Four: Clear Company Goals

Description:
It is a pre-requisite for an efficient implementation that the organization knows the objectives of the organization and the project, and that these objectives are broken down into operational goals for all relevant levels of the organization. This way, the project group can manage the project in the right perspective and make the right decisions based on clear objectives.

Risks:
If the project objectives have not been clarified, some of the risks would be:

- That various clarifications regarding the solution should be discussed before a decision can be reached and this could potentially cost time and resources.

- That prioritization becomes more difficult than necessary.

We recommend:

- Involvement of users with knowledge of the various business areas of the organization.

- Having ambassadors/change agents within the organization.

- Managing the resource situation as a fixed item on the agenda at the steering committee meetings.

- Ongoing measuring of the adaption (e.g. using surveys).

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Risk aversion: It is recommendable to give the detailed project charter high priority. In this charter, all success criteria and objectives of the project should be determined at a detailed level. Subsequently, this should be communicated to everybody in the project group on an ongoing basis to ensure that everybody is aware of the objective through the whole project. In the training phase, the objectives should be made clear to both super users and end users.

**We recommend:**
- That organizations looking to e.g. replace their business solution consider a number of aspects and elaborate their needs and current processes as part of the project
- That focus is kept on the objective of the project and that details, current systems and workflows do not draw attention from why the project has been started and the overall objectives of the project

**Five: Well-Defined Project Charter**

**Description:**
A well-defined project charter is crucial for the project managers because it also sets the scope for the project managers’ authorization. Important elements in the charter are:
- Determining what the implementation does and does not cover
- Breakdown into deliveries and/or activities
- An objective and measurable articulation of the success criteria of the project – preferably in order of priority
- Procedure for change management and communication
- Definition of process for escalation in the project organization
- Determining the division of work between the project parties

**We recommend:**
- Preparation and communication of charter
- That the steering committee approves the project charter document. This is to ensure that everybody in the steering committee has the same perception of the project and its objectives
- A clear process for handling suggestions and changes to the charter

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**Risk aversion:**
It is important to allocate sufficient time to the preparation of the charter right from project launch. Otherwise project stakeholders and team members may perceive the objectives and scope of the project differently, which means they will not have the same focus. The time saved by rushing through the charter in the start-up phase is very quickly spent by the project managers if they need to follow up on and coordinate various activities and discuss what lies within the project charter and what does not.

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**Risk aversion:**
The process of preparing the charter should be led by the project managers who should make sure to allocate sufficient their own time and the most important stakeholders’ time.
**Six: Well-Defined Base Requirements**

**Description:**
It is a good starting point for any implementation project that the organization has an overview of the business and all significant processes and needs. This way, the organization will be able to define the associated requirements for the solution.

**Risks:**
If the requirements for the solution have not been established, there is a risk of
- Wasting a lot of time during the project process due to internal discussions of how the solution should look
- Wasting time and money if the project objective is altered

**Risk aversion:**
An efficient way of ensuring well-defined requirements for the solution is to establish processes and requirements for the new solution and document these. This way, it will always be possible to compare suggested solutions and requirements.

Every project contains areas in which it will be necessary to consider various alternative solutions which cannot necessarily be evaluated on the basis of the requirement specification. It is therefore crucial that the project team is formed by employees who possess a deep knowledge of the organization’s needs, and that they have proper decision-making competence in order to avoid unnecessary project delays.

Organizations typically make a great effort to identify their needs before they can specify their requirements for a new solution.

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**Seven: Proven Methodology**

**Description:**
Over the years it has proved to be a great advantage on implementation projects to apply a project methodology which matches the charter set for the project type in question. This ensures that:
- Time is only spent on activities that create value for the project
- The methodology matches the specific solution and the consultants involved are familiar with the work process
- It is possible to use standard templates that the project team members are familiar with from the beginning of the project

**Risks:**
An obvious risk for our clients – who are primarily project-oriented – is that they let their preferences for a specific project methodology determine which methodology is applied in the implementation.

Another risk is that the stringent and methodical approach to the project gradually becomes a looser model and that there is suddenly no control over the project.

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**Top 10 Key Attributes of a Successful Project**

**We recommend:**
- That organizations be open and flexible in relation to how their needs and requirements are met. This will open up for a discussion of what may be the best solution for them
- That you pay attention to needs, best practices, technology and opportunities that are either provided with the selected solution or evaluated
White Paper

Risk aversion:
In the initial project stage it will be useful to determine not only the project methodology but also what documents should be used in the project. Deltek’s project methodology contains a large number of document templates that can be leveraged. By making these decisions from the beginning, it is possible to oblige all project team members to this methodology and thereby minimize the risks stated above.

We recommend:
• That the project methodology is discussed and agreed upon at an early stage rather than having to change the methodology later on in the project
• That Deltek’s project methodology and the related documents are used. The project methodology PEAK implementation has been developed on the basis of 15 years of experience with hundreds of projects. Among other things, it contains standardized document templates.

Eight: Application Software
Description:
When implementing a new business solution, there are crucial benefits associated with using standard solutions also used by similar clients. For instance, risks related to development projects are eliminated.

Risks:
Even if standard software is used, all implementation projects need extensions. This carries two obvious risks:
• The scope for what should be extended evolves constantly
• The scope evolves because every implementation process requires creative skills. Therefore, it can be tempting to keep thinking of new ways to improve the solution as you gain more and more knowledge of all the possibilities. This would lead to an expansion of the scope and increased time consumption.

Risk aversion:
In the scope it is crucial to determine which extensions should be made for the solution. It is extremely important that the project managers make sure to keep the project within this scope. This can be done by ensuring that no extensions are made without the use of design documents approved by both parties.

We recommend:
• That the organization is open and willing to adjust.
• Preferably, requirements should be met by means of standards (different workflow/ slightly different handling) if possible
Nine: Experienced Project Manager

Description:
Both the client’s project manager and the vendor’s project manager play a vital role in the project. In order to achieve mutual success, it is important for both project managers to have gained knowledge as described below:
• Knowledge of their own organization and the power and ability to handle various obstacles in the most efficient way
• Knowledge of ERP implementation projects
• Knowledge of and dedication to the technical content of the project. This is to ensure that the project manager does not focus exclusively on administrative processes but also seeks insight into the substance of the project

Risks:
The risk of having project managers with limited experience implement large projects is that they become either very detail-oriented with lack of overview and focus on progress as a result, or conversely, that they overlook important details. Furthermore, less experienced project managers may have problems gaining the necessary trust from the project team as well as the rest of the team. This becomes a potential challenge when it is time to handle problems that require various forms of support or effort from the rest of the team.

Risk aversion:
Project managers should be carefully selected on the basis of the above criteria! Regardless of who the project manager is, a role with responsibility for quality assurance of the project management should be established.

Furthermore, it is important that the steering committee challenges the project managers with constructive questions to ensure overview and control of details.

From the initial phase of the project, focus should be on building and maintaining collaborative relations rather than a traditional customer/vendor relationship.
If one of the project managers has a weakness in relation to the items above, it should be considered whether this weakness can be mitigated in practice.

We recommend:
• That the client and the vendor focus on the project manager role and the experience of the project manager
• That the project manager role on large projects is separated from the solution design role even though it can be tempting to attempt to combine these two roles. This is to eliminate the risk of being “caught between two stools”
• That both the client’s project managers and those of the vendor lead the way by joining forces to make sure the project is executed in a partnership
Ten: Experienced Resources

Description:
Project team members – regardless of their function – should have experience within their own field in order to be able to contribute to the project. Depending on their role, they should:
• Be respected in their own organization
• Act as ambassadors for the objective of the project and the necessary changes
• Actively take part of the project
• Have expert knowledge of their own field
• Be open to new input and consider different alternatives

Risks:
The risks are more or less the same as the ones stated in section 3 “User Involvement”, namely that the employees might not be sufficiently allocated and that they are selected on the basis of other criteria than qualifications and skills. An internal project may be perceived as less interesting and less prestigious than an external project and therefore it may be difficult to recruit employees internally.

Risk aversion:
The risk aversion methodology is also very similar to the methodology described in section 3 “User Involvement”. It is recommendable to agree explicitly on how to handle those tasks from which the users involved in the project are freed. When the employee and the involved line management commit themselves to this, it eliminates the risk of having the employee perform double work with deteriorating quality as a result.

We recommend:
• That project team members are officially acknowledged and rewarded for successful project execution. This way, it will be more appealing to participate in the project
• That participation in the project is evaluated positively in accordance with the individual employee’s career in the organization