PROJECT HEALTH CHECK WHITEPAPER

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Revision History:

Revision	Date	Description
A	January 18, 2021	Comments included
0	January 11, 2021	For comments

1. What is the Project Health Check?

The Project Health Check (PHC) is an independent reflective assessment and learning exercise of the status of a project to identify what is going well and highlights the areas of improvement and potential developments during project development.

2. Why do I need a Project Health Check?

It is well known that in many projects, the cost of correcting an issue is many times the cost of preventing it. This has been proved by e.g., independent organisations like IPA (Independent Project Analysis).

Potential looming problems may go unnoticed or ignored because the project team is confident that for example if it sticks to the plan, the benefits will materialize. Project teams, including sponsors and sometimes even members of the Project Steering Committees, are quite often so involved in the day-to-day activities that they fail to recognise the true status of a project.

At company level, by conducting project audits, problems and deviations can be identified and resolved in a cost-effective manner and applied to future projects.

Furthermore, the Lessons Learnt (LL) registers -based on LL workshops which have been facilitated by Boelens Projects In Control B.V. (BPIC)- proved that proper health checks during project development and executions could have saved significant time and costs.

3. Tell me more about the Project Health Check!

The PHC has been based on subjects as described in PMBOK®, PRINCE2®, AACE®, the learnings as gained from Shell Open University and many years of experience in Project Organizations and Project Management Consultancy.

Currently the PHC tool will deal with 12 subjects, and in total 17 subjects are at this time available in the Project Health Check tool by using a picklist:

a) Business Case
b) Organisation & Resources
c) Risk & Opportunity Management
d) Lessons Learnt
e) Schedule Management
f) Cost Management
g) Cost Forecasting and Control
h) Document Management
i) Project Reporting
j) Quality Management
k) Procurement Management
l) Project Plans, Procedures et cetera
m) Project Performance
n) Integration Management
o) Management of Change

p) Stakeholder Engagement
&Communication Management
q) Project Steering Committee

Furthermore, other subjects can be developed and included.

We currently included over 330 questions / statements for the above-mentioned subjects. In average it's about twenty questions / statements per subject. We included default weigh factors which of cause can be changed to tailor the tool to the needs of the project or organisation.

The PHC has been initially designed for starting a project in the early Basic Engineering Phase. The current version of the Project Health Check can be used for project gate passing, as well for the detailed design and engineering and early construction phase (see section 7). Monitoring the improvements over time is quite easy because we can easily compare the outcomes of different analysis.

4.   What type of Project Health Checks are currently available?

We currently offer four types of Project Health Checks:
1) PHC Quick scan
2) PHC Project Assurance Scan
3) PHC Deep Scan
4) Project Control Deep Scan

4.1   Quick scan

The PHC Quick Scan is based on the facilitator questions and statements in the Project Health Check tool. The answers of the interviewees will be noted, so no preliminary judgement about the quality of the answers however each answer might trigger a new question.
Furthermore, the facilitator will ask if the answers are kept in a project specific or company specific document. If, in the opinion of the facilitator, a document should be available in this project stage and is available than the maximum score will be "7".

Higher scores could be considered if the questions or statements are normally not supported in specific documents. The word "normally"' means based on normal industry practise and expert judgement of the facilitator.

The PHC Quick Scan is a good tool for e.g., the early Basic Engineering phase (Define Phase or FED3 in other industries) and will highlight the areas of improvement and the good work done so far. Our recommendation is to schedule a PHC Review halfway the Basic Engineering.

4.2   Project Assurance Scan

The PHC Assurance Scan is designed to facilitate e.g., formal, or informal Project Gate Reviews and will highlight the improvements which should be in place prior

Project gate Passing based on the client procedures (or facilitator's expert judgement if a Project Gate Passing document is not available).

The PHC Project Assurance Scan includes the Quick Scan, and the evidence (if available) must be shown, additional questions are to be expected about the content.

The documents will not be judged about completeness and only based on the answers given by the interviewee. The maximum score of the document-based answers will be "8".

4.3   Deep Scan

The PHC Deep Scan includes the Project Assurance Scan and judgement about the delivered documents, the maximum score is "9". The deep scan is quite often required for e.g., large projects and supports the formal Project Gate Passing process. External resources are available for judging specific documents when needed

4.4   Project Control Deep Scan

During the detailed engineering and early construction phase (Implementation Phase in other industries) it's recommended to focus on Project Control topics based on the assumption that other PHC subjects are fully in control. Many Lessons Learnt registers includes often learnings based on poor Project Control. The Project Control Deep Scan is based on existing PHC topics. Boelens Projects in Control is however already many years involved in all kinds of Project Control Reviews in Europe.

The Project Control Deep Scan consists of:
   a)   Lessons Learnt
   b)   Risk and Opportunity Management
   c)   Cost Forecasting and Control
   d)   Document Management
   e)   Schedule Management
   f)   Project Reporting

In some organisations Management of Change belongs to Project Control as well, it's easy to include this topic, just by two mouse clicks.

5.   Would you tailer the PHC to support our project structure?

Absolutely, we can easily shuffle the PHC questions and statements to support your specific topics or way of working. We develop other subjects as well based on any available project management methodology either in house or with the help of our associates.
If you would like to get an independent view of your companies' Project Management quality system is possible as well, the content is already available just inform us what your expectations are.

The tool is very flexible, you prefer to use a two- or three-color scheme? No problem, it's just some mouse clicks away. You would like to use other criteria for the risk levels? One minute please, we'll change a report setting for you.
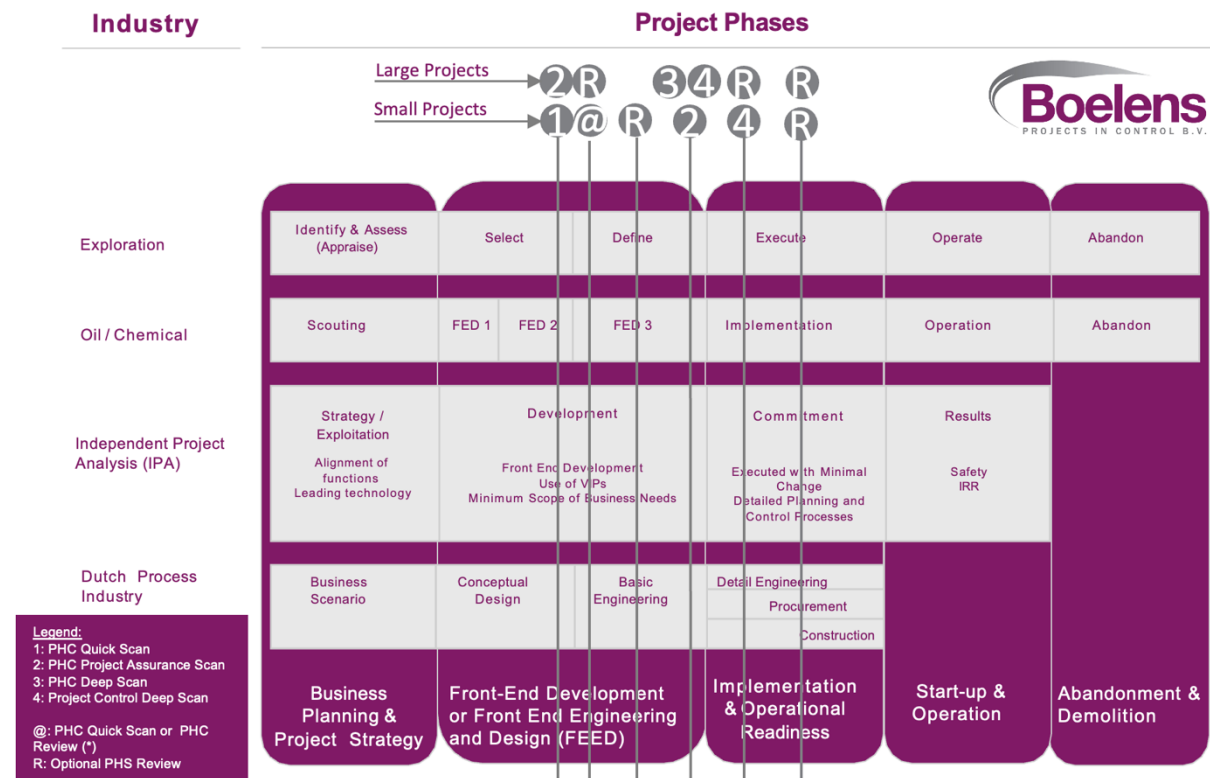
6.   Should we schedule Project Health Checks?

Sure, project health checks should be included in the project milestone calendar and should be detailed in the project schedule. Project Health Checks are in large organisations part of formal project gate passing as well.

7.   When should we schedule our Project Health Checks?

Below you can find the four Project Health Checks plotted in a project phase graph for both small and large projects. Such a graph could be considered as input for a Project Assurance Plan or Project Quality documents.

Optional reviews, indicated with "R", are quite often used in the industry to make sure that potential improvements have been implemented and to prove that the project is in control and executed according to your expectations.
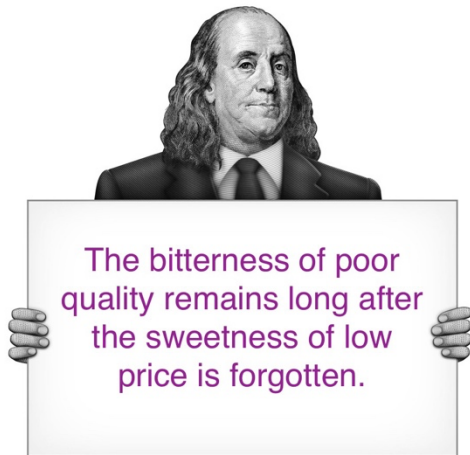

Figure 1Project Health Check Phasing

8.   A Project Health Check is costly!

Sorry we absolutely disagree, check the phrase from Benjamin Franklin below.

The bitterness of poor quality remains long after the sweetness of low price is forgotten.

Independent Project Analyses (IPA) project studies proved that well developed projects during the Front-End Development phase are much better in control than projects with a poor Front-End Development phase resulting in lower costs.

Many engineering companies don't include Project Health Checks in their quotations. If PHCs are included or offered as an optional service, the receiving company could reword you with the contract!

Furthermore, owner companies could use the IPA recommendations and argumentation as internal selling argument as well.

8.1   How do you calculate the price for a Project Health Check?

The PHC tool is using calculation rules which indicates the required time for the PHC preparation phase, the interview phase, and the post interview & close out phase. This calculation module is based on the Quick Scan and Project Assurance Scan only.

A quick estimate, based on the PHC subjects, your location, and type of Project Health Check is just a couple of minutes work. A Deep Scan is more time consuming caused by judging the required project documents and recommendations. The costs for judging the project documents are currently foreseen as the time used multiplied by an hourly rate.

For a Lump Sum calculation, we need some more time based on your input and project characteristics.

9. Can you share an example of the outcome of a Project Health Check?

Absolutely, please find below the default graph. Furthermore, a graph with two colours with the same score is included as well.

For the latter, we changed the risk levels and the meaning to "to be defined" for the two-colour scale example using a picklist).
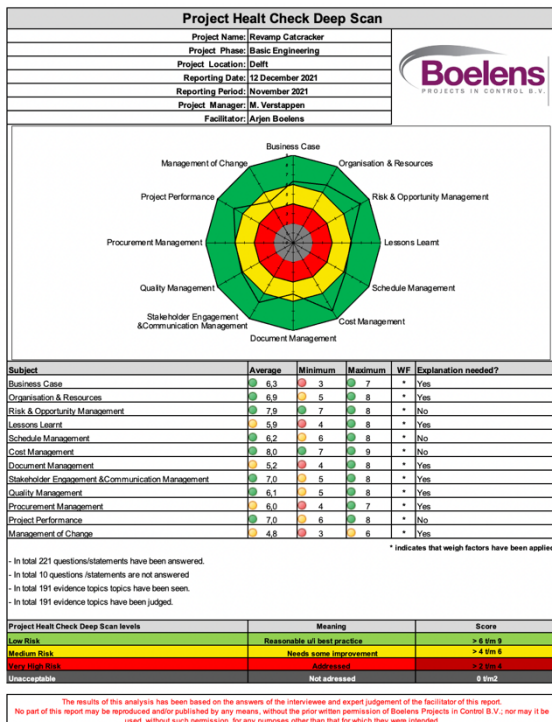

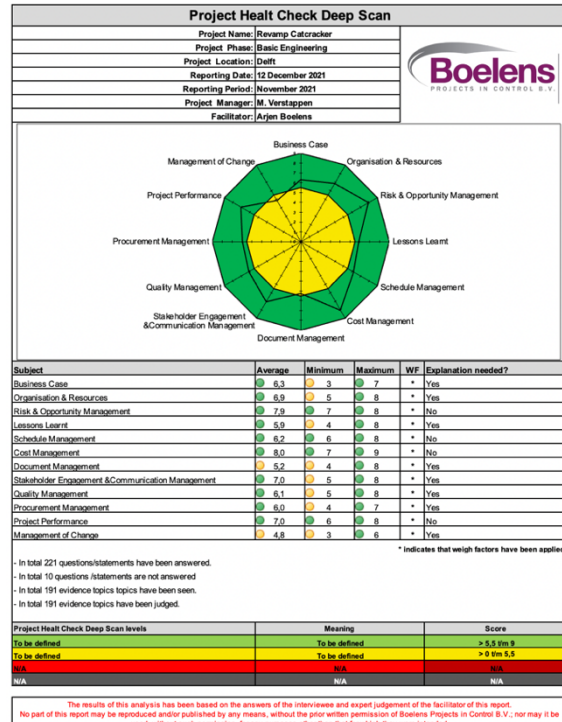*Figure 2 Default Project Health Summary*

Figure 3 Two color layout PHC summary

10. Tell me more about the Project Health Check Report

First, the findings will be shared with you during a meeting supported by a PowerPoint presentation.

The Project Health Check graphical overview as shown in the previous section is the basis of the PowerPoint report and gives already a fair overview of the status of the project.

The interviewees will be listed, a high-level overview will be included, the PHC findings and recommendations will be shared with you. A table regarding documents seen and/or reviewed will be included. The Specific PDF documents which have been reviewed will be marked. All documentation will be combined in one PDF.

Special requirements will be agreed on prior the Project Health Check and included in the report.

11.   Can I get a free copy of the Project Health Check?

Sorry, you don't get a free copy of the Project Health Check and we don't share the questions and statements as used during the interviews in PDF or any another format. All relevant feedback information will be captured in the PHC report.

However, we can build a client specific version based on your own questions and statements using the structure of the Project Health Check Tool. The Tool has been designed for this service as well.

12.   How to contact Boelens Projects in Control B.V.

There are several ways to contact us for more information, a demo, price information or a Project Health Check.

Our e-mail address is info@bpic.nl you can use Arjen.Boelens@bpic.nl or the LinkedIn Messaging option as well.

Telephone number +31 (0)6 13 00 64 62

Potential whitepaper updates will be shared on our website www.bpic.nl menu option "Documents".