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OAKLIN INSIGHTS

Delivery Assurance





Theory versus practice

The theory behind project management is simple, but it is rarely so in practice.

Delivering change is complicated, often unexpectedly so. Organisations seldom fit a perfect theoretical model: they are dynamic and messy, with complex and ever-changing relationships between geographies, departments, teams and individuals. Cost pressures often mean that a business's

talent is thinly spread. In addition, Executive teams are increasingly demanding more from their change investment. The external environment is fluid, resulting in uncertainty and schedule pressure, with the corresponding need for projects to flex and adapt in response to that changing agenda.

Getting projects 'right first time' has never been more important for organisations.



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How did we get here?

When struggling projects finally reach breaking point it can be emotionally, financially and reputationally traumatic for the organisation. Senior leaders are left puzzled as to how things could have gone so wrong, so quickly.

It is not always easy to spot when a project is struggling. Heroic but unsustainable efforts may be made by change professionals to show progress, especially where there is pressure from senior stakeholders to demonstrate success.

Organisations may also not know 'what good looks like' and may simply consider certain behaviours and outcomes to be 'normal'. How often do you hear, "Projects are always late and over budget"?



How can those in a position to influence project outcomes know when to start asking more questions, and what questions should they be asking?

Early warning signs can indicate that a project is under stress, if you know what to look for.

Behavioural:

- Progress being maintained through the heroic efforts of individuals
- A lot of time spent fire-fighting 'issues of the day'
- Seniors dealing with tactical issues rather than driving strategic decisions
- Misalignment of priorities between stakeholders
- A general sense of unease about the status of a delivery
- Poor team morale or a lack of energy across the project

Rigour:

- Sponsors being frequently surprised at what the project team are saying
- Difficulty articulating a business case with precision or confidence
- A lack of clarity of the dependencies between related initiatives
- Large changes to schedule or budget: either to the downside or the upside

Procedural:

- Lots of risks and issues captured but few meaningful mitigations in place
- Unclear, inconsistent or wildly fluctuating project status
- Plans that are repeatedly being re-baselined
- Corners being cut, for example by compressing or overlapping project phases
- Technical solutions diverging from architecture standards

Why can't we resolve this internally?

Many organisations, particularly complex global organisations, have a variety of tools at their disposal that should help ensure projects are delivered successfully. These include in-built checks and balances that are intended to reduce the likelihood of projects failing. These range from strategic investment committees that help decide whether projects are an investment priority, through to independent quality assurance teams, who validate that projects are following best practice and internal standards and methodology, and internal audit, who look for the root-causes of project risks and compliance with internal

policy. Internal change functions also have a strong role to play in delivering and assuring internal change activity.

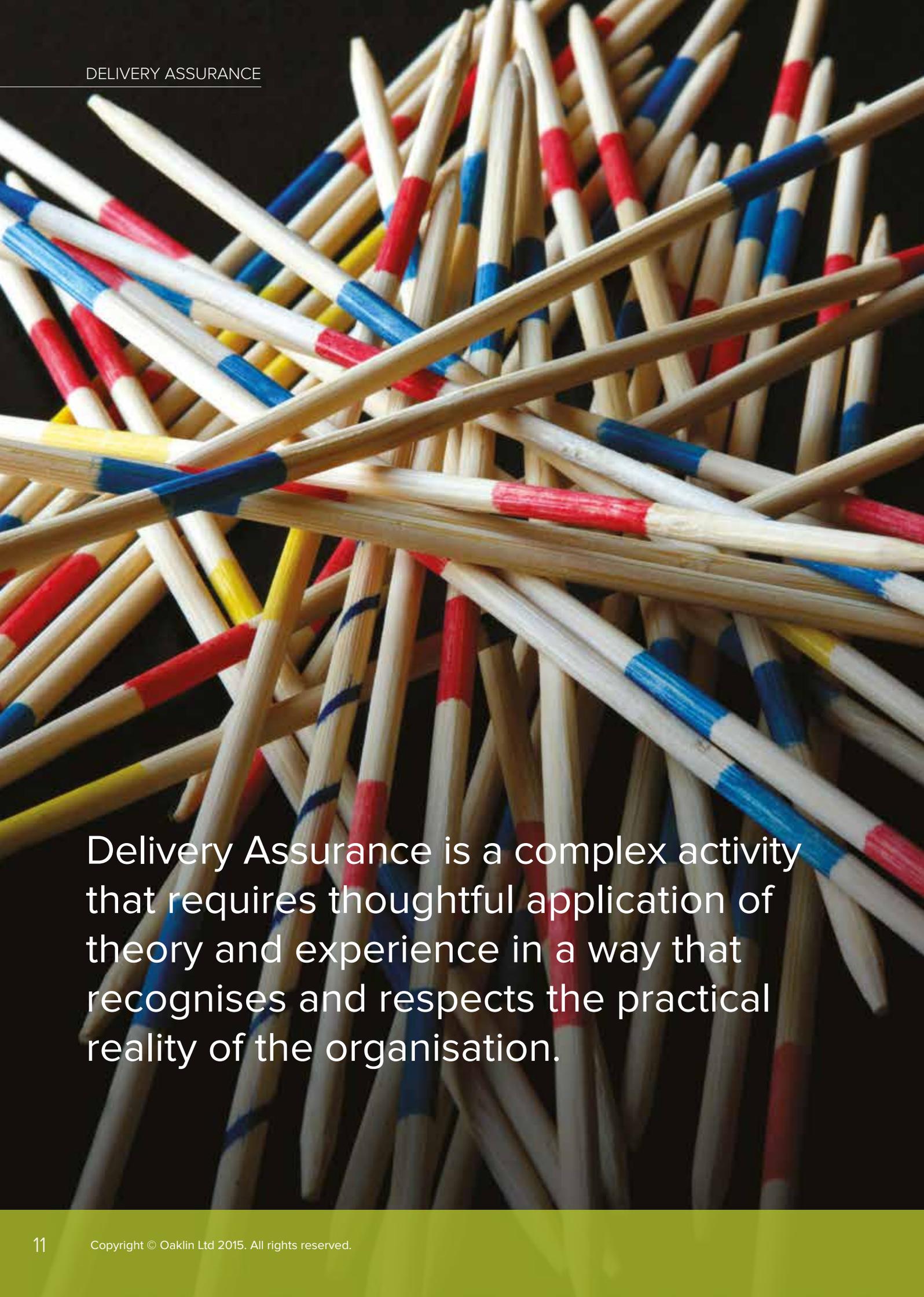
All such teams are important and have critical roles to play in corporate and project governance but tend to be backward looking or procedural in nature. Organisations typically spend a lot of time understanding what has gone wrong, and very little time looking at whether projects are set up and equipped to stop new things going wrong.

In addition, many organisations find it hard to hear messages from their staff. The team

members who are best placed to see issues may be nervous about raising them. No one wants to be the person who says the Chief Exec's flagship initiative is going off the rails and will never deliver what has been promised to shareholders. No one wants to land their close colleagues in 'trouble' by raising concerns about a project delivery, and generating extra work or attention. Or the organisation's project team may simply be stretched beyond their capacity or scale, or challenged by a particularly complex scope.



Many organisations have structural, cultural and capability barriers that make it hard to keep complex change initiatives on track and managed in a way that is likely to deliver the intended outcomes.



Delivery Assurance is a complex activity that requires thoughtful application of theory and experience in a way that recognises and respects the practical reality of the organisation.

Investing in Delivery Assurance

A Delivery Assurance review provides either validation that of the work of a project to its sponsor, or much needed and pragmatic guidance on what needs to be done to ensure that a project stands the best possible chance of success. Far from being a dead cost, Delivery Assurance is an investment in ensuring that projects have the best chance of delivering the outcomes asked of them.

Oaklin's approach is based on a proprietary methodology, executed by a seasoned programme manager with the experience to make an assessment of every aspect of a project's health. Results are confidential to the project director who commissioned the work. The output is always frank, clear and critical where it is appropriate to be so. The report will provide the clearest indication of whether a project is aligned with its intended business outcomes

and whether it is being run in a rigorous manner. It will also provide additional comfort that the information being received by sponsors is valid, or, highlight where improvements in reporting are needed to ensure sponsors are reliably informed about what's going on.

Delivery Assurance must be more than 'ticking boxes'. Done properly, it provides an evidence-based assessment of a project or programme that is grounded in deep practical experience of methodologies, people, cultures, and complex global organisations. To achieve this takes time. At the outset, the antecedent business imperative the project is addressing must be understood and agreed. The assurance review then seeks answers to challenging questions. Is the business still confident in all aspects of the programme? Is the business case still believed? Is the professionalism or

rigour of delivery proven? Are the technical solutions appropriate and being implemented in the correct way? Is it simply that there are risks around schedule or budget slippage that must be managed?

Most importantly, the conclusions from a Delivery Assurance exercise should be positive, forward-looking and precise: what specific actions are needed to put the project or programme on the right path to success and how will the team know that they have implemented those changes successfully. Review findings should be agreed with those who provided input and sensitively messaged to those impacted. Stakeholders need to accept and commit to the recommended actions. Where appropriate, learnings should be shared widely to ensure the wider organisation gains value as well as the immediate delivery team.

What should Delivery Assurance look for?



Leadership:

- ① A clear description of the project's contribution to the strategic goals of the organisation
- ② A coherent vision and a practical approach to achieving agreed outcomes
- ③ An understanding of how the project fits with other, related initiatives
- ④ Strong leadership and an engaged set of senior stakeholders
- ⑤ A clear strategy and plan for communicating appropriate messages to the wider organisation

Process:

- ⑥ Professional management techniques with the right balance between speed and rigour
- ⑦ A team that is joined up and acting as 'one team', aligned to a clear plan
- ⑧ The means to assess and adjust in a controlled way to internal and external changes
- ⑨ Clarity over how relevant enterprise and technical architecture standards are employed

Ways of working:

- ⑩ A focus on helping senior representatives make effective decisions
- ⑪ A culture of transparency and openness at all levels with no barriers to communication between levels
- ⑫ Third-party relationships that are underpinned by unambiguous commercial foundations that align to the project's objectives
- ⑬ The correct skills deployed into clearly defined roles, without undue stress on key individuals

Effective Delivery Assurance cannot be carried out remotely from a desk.

A structured and hands-on approach is essential for a rigorous and successful outcome. Face-to-face interviews with key team members are critical to the process, conducted in a way that creates a 'safe zone' for concerns to be raised and explored on both sides. The process must be set up to be, and seen to be, a positive help to the project team rather than another admin task they don't have time for.

The interviews should start with project sponsors and business and functional

stakeholders in order to gain an understanding of the strategic rationale for the project, and then move through the project structure to include a subset of the project team to assess how effectively the project is being run.

How deep into the project organisation and how holistically each area is represented depends on the depth of the assurance review required and any specific challenges that are to be addressed. For example, the focus may

be to validate whether the project is truly on track, or to confirm that technical solutions are fit for purpose and align to functional strategies.

It is seldom necessary to interview every member of the team, but there must be appropriate coverage across the various internal teams and external suppliers involved to gather appropriate evidence to support solid conclusions.

For each project characteristic being assessed, a clear model of 'what good looks like' is needed to ensure there is a benchmark to assess against. For example, it is not good enough that a project plan exists – it must reflect the priorities of the business, coherently articulate the delivery approach of the project,

be understood and agreed by the project team and its leaders, and enable effective management control of the delivery. Similarly, it is not enough for the lead integrator's contract to have been reviewed only by the legal department. It must be understood by the project leadership and structured in a way that encourages behaviours that are aligned to the project's objectives. Delivery Assurance work should look for clear evidence of all these aspects during the interview process.

All recommendations must be grounded in evidence, and the assessor should be comfortable testing hypotheses and exploring issues that surface during the assurance process.

The assessor must also be comfortable delivering difficult messages.

For example, it is possible that the root-causes of problems in detailed aspects of the delivery may stem from behaviours of senior managers in the organisation. There are also potential HR challenges where the team's capabilities are not aligned to the project's needs.

It is always better to deal with issues sensitively but directly, even if doing so is potentially disruptive to the delivery or is very late in the delivery cycle.

Why Oaklin?

Oaklin can take a fresh look at your project landscape. Our experienced consultants will quickly and cost-effectively validate that your change initiatives are set up for success, assess whether they are being run in an optimal way, validate that internal policies and standards have been adopted correctly (covering both business process and systems architecture), and determine if the planned outcomes are likely.

We will leave you with a clear set of evidence-based recommendations that we would be prepared to stand behind and deliver if asked.

Oaklin is an independent management consulting firm. We focus on understanding and solving our clients' biggest problems.

Our clients engage us to help with their most challenging business problems, valuing our

integrity, versatility and experience. We specialise in placing highly experienced people and small teams into key roles that make a real difference to an organisation. We do not seek to deploy pyramids of people or juniors.

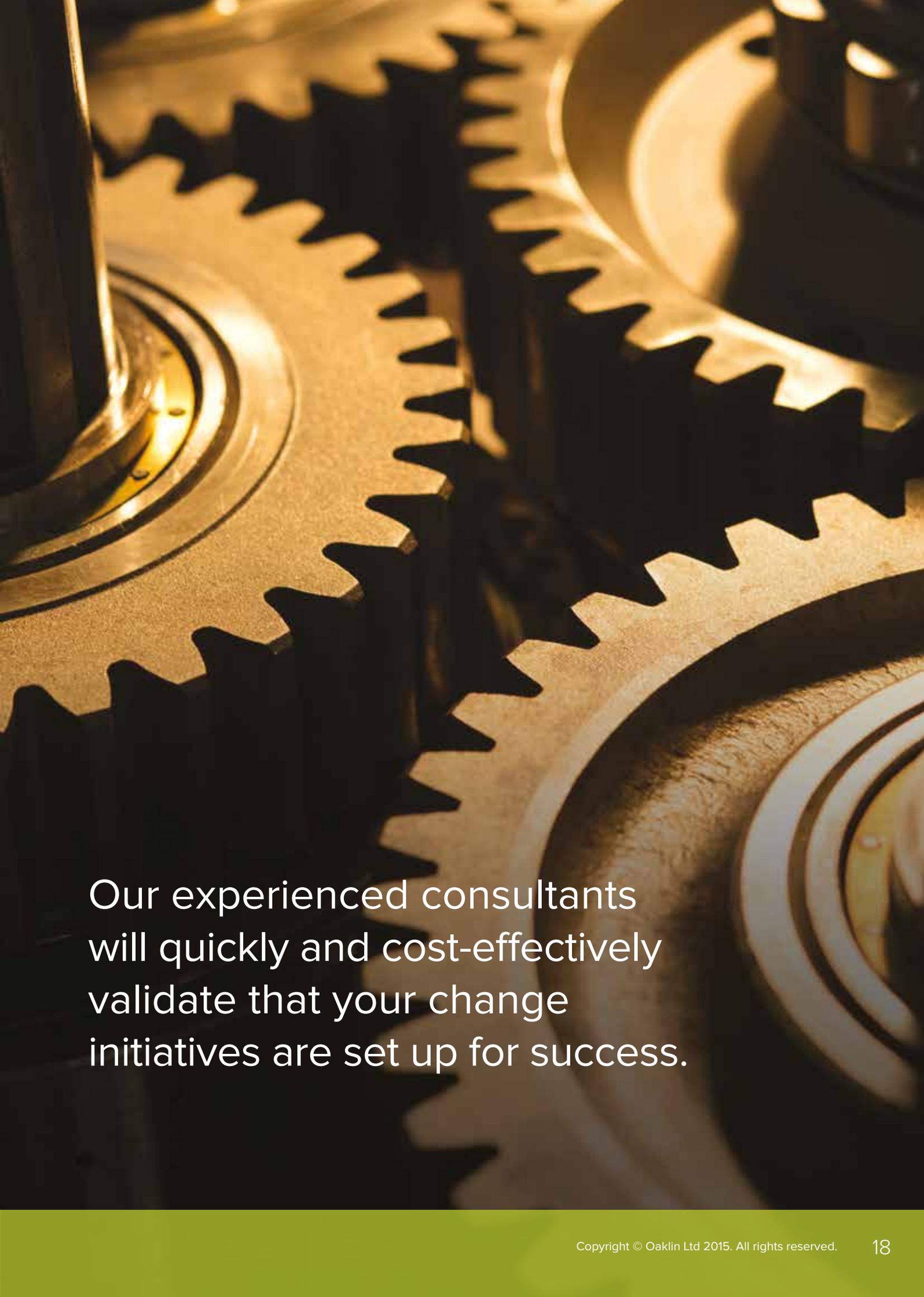
Oaklin knows what is needed to realise a vision and make change happen in complex global organisations. We avoid abstract theory, preferring to anchor our advice in pragmatic, specific recommendations that are relevant to your organisation and the issues you are facing. We deal sensitively with personal, staffing, political, legal, and regulatory challenges.

We are happy to stand behind our advice and implement our recommendations if required, or work with your team to create a realistic remediation plan that can

be implemented by your own organisation. We will provide an honest assessment of the delivery and not shy away from sensitively addressing difficult questions.

Oaklin has no internal sales targets or external alliances. Your interests are our interests. You can be confident that we act with the utmost integrity.

We neither seek to entrench ourselves nor outstay our welcome. If we do not believe we can add value, we will tell you so. We thrive on helping organisations improve their internal capability and will step away once our contribution is complete.



Our experienced consultants
will quickly and cost-effectively
validate that your change
initiatives are set up for success.

Get in touch!

Oaklin would be delighted to hear from you and discuss how we can help assure your delivery portfolio, or help more broadly with your business challenges.

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