



## Project healthcheck

### Knowing when things go wrong, and how to recover

- How confident are you that your project is on track?
- Will it hit its milestones?
- Will it deliver to the expected quality standards?
- Will its benefits be tangible and sustainable?
- Is the business ready for and committed to accepting the change?

This paper outlines some of the signals that can give you early warning that things are going wrong, and pointers for how you can respond quickly and effectively.

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### When did you last fully check the health of your project?

Your usual project governance processes – weekly or monthly reporting, issue and risk management, change control and so on - should be effective for monitoring whether the project is on track.

However, important problems can be obscured by the intensity of day-to-day management. If there is no need for immediate action, these important problems can become blind spots.

A project healthcheck can help you take a step back to identify blind spots. You can then create an effective action plan to get back on track with clarity and focus.

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Importance	High	<p><b>Possible blind spot</b></p> <p>Example: Stakeholders not bought into solution</p>	<p>High-effort issue management</p> <p>Example: Supplier fails to deliver key deliverable</p>
	Low	<p>Low-effort monitoring</p> <p>Example: MI needs 1 day a month workarounds</p>	<p>Moderate-effort issue management</p> <p>Example: 1-week delay to signoff of design</p>
		Low	High
		Urgency	

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### What does a project healthcheck do?

A project healthcheck reviews all the areas that are crucial to the successful delivery of the project (see diagram below).

However, an effective healthcheck is much more than a “ticklist”. It requires experience and shrewdness to see through the mass of data (and the inevitable spin) to pick out what really matters.

Strong engagement with the key stakeholders is vital to piecing together the story, and making sense of the inevitable conflicting understandings of what is happening.

Example: the IT project manager is convinced that the systems design is strong and will deliver the right solution – after all, it has received formal signoff. Meanwhile, the marketing director expresses concerns that he doesn’t really understand how it will work in practice, but has been reluctant to voice these concerns as he is a self-confessed technical illiterate. Result: high risk of not delivering business benefits, but no visibility of the problem.



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## What specific areas does a healthcheck cover?

Below is a small selection of the areas that a typical healthcheck will cover.

### **Project plan**

Is there a detailed project plan in place that is actively monitored?  
Are all resource needs (who, when) understood and specified in the project plan?

### **Resources**

Are sufficient project team members and business resources available at the right times?  
Are roles and responsibilities clearly understood by all project team members?

### **Stakeholders**

Have stakeholders been given the opportunity to provide effective input early in the project?  
Do stakeholders accept ownership of the project objectives?

### **Business case**

Has the project been fully costed and budgets/funding agreed with the sponsor?  
Are estimates of the financial and commercial benefits of the project in place?

### **Benefits sustainability**

Are the owners and users capable of implementing project deliverables within the business?  
Are processes in place or planned to measure the benefits of project?

### **Expertise**

Do all members of the project team have appropriate levels of expertise?  
Is adequate training (and time for training) incorporated within project scope and schedule?

### **Objectives**

Are the objectives of the project clear to all stakeholders and members of the project team?  
Are the objectives of the project widely supported?

### **Sponsorship**

Does the project sponsor share accountability with the project team for the project's success?  
Is each project team member enthusiastic about the chances of success of this project?

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### Where do the benefits of the healthcheck arise?

Once you have completed the healthcheck, you should analyse the findings, pull out any common themes (eg resourcing issues may arise in a number of disparate areas), and rate the potential impact of each issue on the business. This should be a collaborative process with senior project stakeholders – their buy-in to the action plan will be crucial.

Now, in conjunction with stakeholders, develop and agree a detailed and prioritised action plan. This should be agreed with a wide range of affected parties across the project and the business. Buy-in to the plan is crucial – it should be positive, realistic and focused.

As with all plans, the action plan needs to be highly visible and executed with rigour and tenacity – including regular review points where progress is formally assessed and any further corrective actions agreed.

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### Links

[Project healthcheck](#) – A simple spreadsheet giving a basic analysis of the health of the key areas of a project.

[PRINCE2 Manual](#) - Appendix D contains a healthcheck from a PRINCE2 perspective.

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### Will it work for you?

If you would like to discuss whether a project healthcheck could help ensure that your project is on track, contact Ian Hadden of Root Six Consulting for an initial conversation.

