*Project Management*

Discovery Survey

Basic

*A basic tool intended to provide a quick and top level view of the level of maturity of project management fundamentals within a given organization to support the identification of improvements in the management of projects*

***Basic Version 2.0 – 2015***

*This Survey is Updated Periodically. Latest Version of this Assessment and Other Assessments can be Found at* [*www.manageprojectsbetter.com*](http://www.manageprojectsbetter.com)

*Developed and Provided by*

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NOTE

This discovery survey is intended to provide only an initial and very top level view of potential improvement needs and is not a substitute for a comprehensive project management evaluation also available. See “Intent and Summary” for more details.

**USAGE LIMITATIONS**

*This evaluation survey is provided to the recipient for the purpose of performing a quick and top level evaluation of project management functions within the recipient’s organization. The recipient is authorized to copy, distribute and use this document within their respective organization for this stated purpose. The sale or any other commercial purpose other than stated above is strictly prohibited.*

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**PM Discovery Survey - Basic**

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**Intent, Scope and Summary**

What - This survey is a BASIC tool to support an organization in evaluating the performance of project management for the purpose of making improvements. *(Note: A more detailed intermediate version of this improvement tool can be found at* [*www.manageprojectsbetter.com*](http://www.manageprojectsbetter.com) *).*

Intent - The intent is to understand the many aspects of what is needed to establish a sound project management function and then to form a view of what aspects are good and what can benefit from improvements. An alignment with the organization’s strategic priorities is an additional key part of this process..

Scope - The scope of this survey is project management and it is not focused on other organization functions or disciplines though the evaluation and improvement actions often do support improvements in many other adjacent areas.

Content Basis – Studies have shown that projects get into trouble and are successful for a known set of repeating conditions. The set of assessment questions in this survey are focused on these repeating conditions that are generally the root causes of project issues and are common project success factors.

Content - This PM improvement tools has the following parts:

[Instructions](#Instructions)

1. [Define Desired Organizational Level Improvements](#A)
2. [Identify the Current Environment](#B)
3. [Assess Project Management Core Components](#C)
4. [Improvements Consolidation Table](#D)

More Comprehensive PM Assessment Tools - This survey is not a replacement for a more comprehensive project management evaluation which surfaces root causes and which contains many more questions that are tailored to the organization’s respective environment. These more detailed assessments involve multiple levels of interviews and follow-up discussions. The two assessments can be characterized by the following. If one is deciding to remodel an office building, this Discovery Survey might tell you what floors and which rooms in the building need the most attention. The more detailed comprehensive assessment will extend that “room by room” evaluation to identify what individual structural, electrical, plumbing and finishing improvements are needed in each room. The value in this Discovery Survey is that an organization can perform, without external consulting support, an initial evaluation of the project management discipline and identify real improvements. See [www.manageprojectsbetter.com](http://www.manageprojectsbetter.com) for information on more comprehensive assessments.

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Instructions for Use

* Select Survey Completion Approach - You can complete this survey as an individual or you might have multiple individuals in your organization respond to the survey. The latter is recommended followed by a team meeting to discuss and consolidate the results. This team approach is important for several reasons. Any one individual may not have a complete and accurate view of all evaluation topic status and the team approach builds ownership of the evaluation results and subsequently defined improvements.
* Set Pre-Survey Expectations – If you are completing this survey as an individual, charge ahead. If you will complete the survey as a team, it is important that the team understand the “what and why” of the survey to both support their engagement and to ensure the responses are complete and accurate. To engage the team, a clear view of what you intend to do and not do as a result of the survey should be communicated. Communicating what the advantages to the organization and the advantages to themselves as improvements in project management are accomplished. A pre-survey kick-off meeting would be one way to properly set expectations. The survey developer can provide an introductory slide set.
* Capturing Your Responses – Complete Sections “A, B & C.” When entering responses to the survey questions, each responder should provide their individual view of the most commonly occurring current state, not what they want it to be, not the worst experience, not the best experience, not how they might perceive others view the question. Only current, real and commonly occurring assessment information should be recorded to support an accurate understanding of the current state and to form the foundation for effective improvements.
* Question Applicability - All statements are typically applicable to all organizations. If any statement does not appear to be applicable, note that as your response and discuss that with your team to ensure all applicable areas are addressed.
* Consolidate Responses – As Sections “A, B & C” are completed, use the table in Section “D” to consolidate your findings and to identity your top priorities. Instructions in Section “D” provide more details. If completing the assessment as a team, form one survey document that is a consolidated view of the team’s responses as best as can be accomplished. Where individual team member responses vary due to factors such as different project experiences, include a note that multiple different responses exist and what they were.
* Define Potential Actions for Improvement – As responses are consolidated and results are analyzed and priorities set, potential improvement actions are defined.
* Select Specific Actions for Improvement – Specific improvements are selected through a comparison of potential improvements using a “High/Low Payback and Easy/Hard Effort” criteria.

(See [Section D](#D) and an example results consolidation table and for further instructions.)

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**A) Define Desired Organization Level Improvements**

Organizational improvements should be focused on the areas most important to the organization and focused on areas where improvements are needed and provide the greatest payback relative to the costs of improvement in terms of finances, resources and time. Where well intended and even needed improvements do not align with an organization’s strategic interests, investments on improvements may not be the best use of organization resources. Additionally when too many improvements are considered at a single point in time, the level of improvements achieved is most often diminished and may result in no real improvements being realized at all. For your organization, select the top improvement priorities to be addressed now. Non-selected items can be important and can be addressed at a later time.

1. **Top Improvem****ent Priorities – Select Several Top Priorities for Organization Level Improvements.**

Perform the following steps:

1. Review your organization’s mission and vision and note your organization’s top priorities for the current timeframe.
2. For each of the following possible top priorities, identify what improvements would be of value in meeting and/or maintaining your organization’s mission and vision
3. Then, select two or three of the following top priorities that do both of the following:
   * Align with the mission and vision, AND
   * Are the most important things to improve first

**Increased Value to Customers**

*(state top values provided to customers that should be improved)…*

**Higher Quality Project Deliverables**

*(state what quality improvements are needed)*

**Shorter Project Schedules**

*(state what schedule performance is needed)*

**Reduced Project Costs**

*(state what cost performance is needed)*

**Increased Innovation in Project Outcomes**

*(state what improvement is needed)*

**Increased Project Teamwork and Collaboration**

*(state what improvement is needed)*

**Increased Team Skills and Knowledge**

*(state what improvement is needed)*

**Other** (Define)…

*(state what improvement is needed)*

**Other** (Define)…

*(state what improvement is needed)*

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**B) Identify the Current Project Environment**

Improvements in how projects are managed need an understanding of the current state of the environment that projects exist within. Respond to the following statements to provide the individuals that will analyze the survey results with an adequate understanding of your current project environment. Responses should be what conditions exist today, not what you want it to be.

1. **Current Project Outcomes - Projects deliver what the customers of the project need.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Any notes / clarifications to further explain your assessment response above:

1. **[Deliverable Quality – Projects deliver acceptable quality deliverables,](#a3) independent from schedule and budget performance.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Any notes / clarifications to further explain your assessment response above:

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1. **Schedule Performance - Projects meet schedule goals, independent of deliverable quality and project budget performance.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Any notes / clarifications to further explain your assessment response above:

1. **Cost Performance - Projects meet budget goals, independent of schedule and deliverable quality performance.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Any notes / clarifications to further explain your assessment response above:

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**C) Assessment of Project Management Core Components**

This is an assessment of the project management function addressing the core components of PM individually. Your responses here will be the majority basis for the identification of improvements. Enter what information is known for each question. Enter any notes or clarifications you feel would be important for a reviewer to fully understand your responses. The entries related to corrective actions are optional; enter information here if some improvements have been attempted and/or if some improvements are being contemplated.

1. **Project Deliverable Definition - The definition of what the project will deliver is sufficiently defined in the early phases of a project to the degree necessary to allow the team to identify all needed project work to support the development of an adequate project plan.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Any notes / clarifications to further explain your assessment response above:

1. **Feasible Constraints – Project constraints such as schedule limitations, budget limitations and resource limitations are compatible with the work required to provide the needed project deliverable.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Notes / clarifications to further explain your assessment response above as needed.

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1. **Project Planning Skills – PMs and project teams have adequate skills and experience to develop sufficiently accurate and complete project plans where the resulting plans can adequately direct project work and effectively measure project progress.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Notes / clarifications to further explain your assessment response above as needed.

1. **Project Initiation - Project initiation often addresses project deliverable requirements, constraints, roles and other needed project information. Projects are started (initiated or kicked-off) in a manner that supports a successful project outcome.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Notes / clarifications to further explain your assessment response above as needed.

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1. **Requirements Compliance Tracking - Projects track project work compliance with the requirements established for the project’s deliverable in a manner sufficient to understand deliverable requirements compliance status.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Notes / clarifications to further explain your assessment response above as needed.

1. **Schedule Management - Projects track schedule performance in a manner sufficient to understand true schedule status.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Notes / clarifications to further explain your assessment response above as needed.

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1. **Budget Management - Projects track work completed vs. budgets expended in a manner sufficient to understand true budget status.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Notes / clarifications to further explain your assessment response above as needed.

1. **Change Management - Changes in project work scope and/or changes in schedule needs and/or changes in budgets and/or changes in resources available to the project are adequately managed and known and understood by all relevant stakeholders in a manner sufficient to support a successful project.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Notes / clarifications to further explain your assessment response above as needed.

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1. **Risk Management - Projects identify and manage risks to project success in a manner sufficient to support project success.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Notes / clarifications to further explain your assessment response above as needed.

1. **Available Resources - Projects generally have adequate resources sufficient to complete project work within quality, schedule and budget limitations.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Notes / clarifications to further explain your assessment response above as needed.

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1. **Defined Team Member Roles - Roles and accountabilities for individual project team members are adequately defined, understood and accepted in a manner that supports project success.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Notes / clarifications to further explain your assessment response above as needed.

1. **Team Communications - Project team internal communications are adequate to support project success.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Notes / clarifications to further explain your assessment response above as needed.

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1. **Defined PM Role - A specific role, accountabilities and authorities are defined for the project management position within the organization and this role is understood and accepted by all relevant stakeholders. No PM role confusion or issues exists.**

YOUR ASSESSMENT - *For your environment, check one of the following that best describes a truthful response to the above statement:*

***Mostly True  Somewhat True  Mostly Not True  N/A***

Notes / clarifications to further explain your assessment response above as needed.

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**D) Improvements Consolidation Table**

Instructions - As the responses to “[Section C](#C)” are completed, use the table in this section to collect information about improvements. (You might find it convenient to copy the table into a separate document and to change the orientation to landscape).

**Step 1 / Column 1 - Organization Improvement Priority Review** - Review your responses to “[Section A](#A)” and then in the table in [Section D](#D), place an “X” in the column titled “1-Top Priority” in the table for those PM topics where improvements in that topic support the top organization improvement priorities identified in [Section A](#A). As an example, if one of the top improvement priorities in [Section A](#A) included “better project schedule performance”, then you might place an “X” in the table in [Section D](#D) in the “1-Top Priority” column for any topic you believe would support improved schedule performance. Topics in the table such as “16-Planning Skills” for better schedule planning, “19-Schedule Management” for better schedule tracking and “21-Change Management” for better schedule change management, might be top priority topics you select that would be the drivers of improving schedule performance. External expert advice can be of value in this step as PM experts understand the relationships between needed improvements and the components of project management.

**Step 2 / Column 2 - Considered Improvements or Not** – Take each assessment topic one at a time and do the following. Review your assessment of a given topic in [Section C](#C) and review any improvement notes (past or future intent) you might have included for that topic. With this information, make a decision if an improvement should be considered. Capture your selection in the column titled “2-Consider Improvement” using the “ *YES or  NO” selection* boxes. Select all improvement you will consider now and in the future without regard to cost of implementation, impacts or payback.

**Step 3 / Column 3 - Define Potential Improvement Actions** - For each topic in the table where an “X” exists in column 1 and a “YES” is selected in the column 2, review your responses to each given topic in “[Section C](#C)” and decide what specific improvement actions could be taken. Record potential improvements in column 3. External expert advice can be of value in this step as PM experts understand what effective improvement actions are often needed for each topic and understand in what situations multiple parallel improvement actions would be required.

**Step 4 / Column 4 - Potential Improvement Action Difficulty and Pay Back Estimate** – For each identified potential improvement action defined in column 3, use the “ *Easy  Hard  High Pay Back  Low Pay Back* ” selection boxes in column 4 to indicate your estimate of both the difficulty of the potential improvement action and the anticipated pay back from that action. Where multiple improvement actions are identified for a given topic, replicate these selection boxes in the table to allow for responses for each individual potential improvement.

**Step 5 / Column 5 - Review Potential Improvement Actions and Select** – Review the information you have captured in the table. Ask your team if all believe the information is of sufficient quality as this information now becomes a key driver for your improvement efforts. In a team discussion, review all prior columns and your assessment information in other sections as needed and make a determination if a given improvement is to be accomplished in the near term or in the future using the *“☐ Now ☐ Later”* selection boxes. Finally select 2 or 3 “now” improvements for actual implementation and plan to revisit this information in the future to determine if it is time to address other improvements.

**Improvements Consolidation Table**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Assessment Topic | 1-Top Priority  = “X” | 2-Consider Improve or Not | 3-Potential Improvement Actions | 4-Easy or Hard  High or Low Payback | 5-Improvement Selected for Action |
| 1. [Project Deliverable Definition](#a12) |  | ***YES  NO*** |  | ***Easy  Hard  H PB  L PB*** | ***Now***  ***Later*** |
| 1. [Feasible Constraints](#a14) |  | ***YES  NO*** |  | ***Easy  Hard  H PB  L PB*** | ***Now***  ***Later*** |
| 1. [Project Planning Skills](#a16) |  | ***YES  NO*** |  | ***Easy  Hard  H PB  L PB*** | ***Now***  ***Later*** |
| 1. [Project Initiation](#a17) |  | ***YES  NO*** |  | ***Easy  Hard  H PB  L PB*** | ***Now***  ***Later*** |
| 1. [Requirements Compliance Tracking](#a18) |  | ***YES  NO*** |  | ***Easy  Hard  H PB  L PB*** | ***Now***  ***Later*** |
| 1. [Schedule Management](#a19) |  | ***YES  NO*** |  | ***Easy  Hard  H PB  L PB*** | ***Now***  ***Later*** |
| 1. [Budget Management](#a20) |  | ***YES  NO*** |  | ***Easy  Hard  H PB  L PB*** | ***Now***  ***Later*** |
| 1. [Change Management](#a21) |  | ***YES  NO*** |  | ***Easy  Hard  H PB  L PB*** | ***Now***  ***Later*** |
| 1. [Risk Management](#a22) |  | ***YES  NO*** |  | ***Easy  Hard  H PB  L PB*** | ***Now***  ***Later*** |
| 1. [Available Resources](#a23) |  | ***YES  NO*** |  | ***Easy  Hard  H PB  L PB*** | ***Now***  ***Later*** |
| 1. [Defined Team Member Roles](#a24) |  | ***YES  NO*** |  | ***Easy  Hard  H PB  L PB*** | ***Now***  ***Later*** |
| 1. [Team Communications](#a26) |  | ***YES  NO*** |  | ***Easy  Hard  H PB  L PB*** | ***Now***  ***Later*** |
| 1. [Defined PM Role](#a31) |  | ***YES  NO*** |  | ***Easy  Hard  H PB  L PB*** | ***Now***  ***Later*** |

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**END OF PM DISCOVERY SURVEY**

>> Basic Version <<

*Developed and Provided by*

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