

Process & Techniques

Escaping the Clutches of

Zombie Projects

Risk communication tools that can help you
keep your projects safe by Payson Hall

►► QUICK LOOK

- Overcoming barriers to communicating risk
- Questions to ask Senior Management

Somewhere in your organization, an ongoing development project has breathed its last breath. It isn't going to deliver on its promises and the team knows it. The project is a zombie, one of the walking dead,

but the organization continues to invest resources to get it done. The development team has been working sixty-hour weeks, and they're getting irritable. The testing team is starting to work seventy-hour weeks, and the chaos and stress are mounting. People have begun using the copy machine surreptitiously, wearing suits to work, and taking longer lunches. This week an ill-informed executive tried to allay the fears of one of the would-be customers of the

doomed effort: "The project is going well," he said sincerely. "I'm sure you will be pleased with the results."

If your organization canceled the dead project now, it could cut its losses and redeploy the people to more productive work—but it can't. If your organization canceled the dead project now, it could stop telling fairy tales and destroying relationships with its customers—but it can't. Why is this "zombie project" continuing? Why doesn't Senior Management give it last rites and make it lie down and rest in peace?

Because Senior Management doesn't *know* the project is in trouble, and won't until the last possible minute.

Is this a conspiracy? Voodoo? Sabotage? More likely, the line managers (development managers, QA managers, testing managers, project managers) have been trying to get the message through, but it isn't being heard. Perhaps they have given up—surmising that the senior managers don't *want* to know.

The only way to drive a stake through the hearts of these zombies, then, is to deliver bad news in such a way that Senior Management can hear it. My goal here is to give line managers some communication tools for delivering that bad news. Using these tools, you might even be able to change the outcome, if you can incite Senior Management to act promptly. Most organizations would appreciate the opportunity to deal promptly with troubled projects. Unfortunately, there are barriers to the delivery of bad news. These communication barriers result from the culture, skills, fears, and uncertainty of the humans involved.

Culture

Organizations and people value positive thinking. But trouble arises when organizations begin to reject any discussion of actual or potential project problems as “negative thinking.” The shift can be gradual and subtle, but the consequences are devastating. Refusing to discuss the possibility of project failure establishes barriers to effective communication and management. These barriers take the form of cultural taboos:

- We can't admit or discuss that any project is a gamble from the start
- We are forbidden from effectively identifying or mitigating potential risk
- We don't periodically reassess the wisdom of continuing a project

These taboos institutionalize denial; fighting zombies is hard when you're not even allowed to admit they might exist. Taboos also create communication barriers that inhibit the information flow essential to informed decision making. Overcoming these barriers requires cultural change and effective communication.

Skills

Most courses of study for system professionals focus on the latest technical tool or methodology and dismiss “soft skills” such as communication and management as irrelevant. The truth is that hard and soft skills are

closely linked, and both are important. When projects get into trouble, it's often technical difficulties that start the snowball rolling downhill. But few projects fail for exclusively technical reasons; existing communication problems compound when stressed, and they amplify technical shortfalls and other issues by delaying effective responses. Unfortunately, few people have the skill to overcome communication barriers and deliver bad news.

The communication skill problem is further compounded by the emotions that frequently surround the message. Bad news is disappointing, and disappointed people can be emotional—angry, critical, sad, and blaming. While I can't recall being taught this anywhere in my professional education, I've learned through experience that I shouldn't take the boss's reaction to bad news personally. When I make the mistake of internalizing someone else's reaction, it's easy to get caught up in my own emotions (anger, fear, guilt, and doubt). Those emotions tend to make communication more difficult, even for skilled practitioners.

Fear

The fear that the undead can inspire is nothing compared to the utter and complete dread many people feel about *discussing* zombie projects. When you believe that there are negative consequences for delivering bad news, it takes a lot of courage to speak up when something's wrong.

Telling people “Don't be afraid” is hollow advice in those organizations that make a habit of shooting the messenger. Most people can be courageous when they are sure of themselves and the quality of their facts. But when we have limited data, or only part of the picture, we have less confidence; our impressions and opinions might be right, but also might be wrong.

Uncertainty

Fear is compounded by uncertainty. If only there were a simple yes/no gauge to tell us with assurance whether or not software was ready to ship! Unfortunately, development projects in

progress are ambiguous and defy certainty—presenting us with another barrier to communication. When a project is fatally and obviously flawed, it's easy to be brave; we can simply point to the data and say, “See, this project is doomed.” But when things are more ambiguous, or we have only part of the picture, it's harder to say with conviction that the effort won't deliver on its promises. “Positive thinking” or outright denial from Senior Management reinforces the barriers created by uncertainty when you try to deliver an unpleasant message.

You: Testing is not going well. We continue to find serious faults in the system, and Development's turnaround for fixes to our identified faults has been slower than we expected. I'm concerned that our ship date of the 15th is in jeopardy.

Boss: The development manager told me things are going better. Are you telling me that you think there are a lot more serious problems to be found?

You: Well, turnaround from Development has improved, but we're continuing to find serious problems with each new build. We can't know how many more serious faults we'll find until we have a stable application.

Boss: So the development team is doing a better job of turnaround on identified faults, and testing is progressing more quickly as a result?

You: Yes, but—

Boss: —I'm glad to hear that your team is doing a good job of finding faults in the application and that the development team is being more responsive. Keep up the good work. You and the test team will have to finish finding the problems and getting them to Development so they can be resolved in time for that ship date.

If this sounds familiar, it's because this discussion occurs in various forms, hundreds of times each day. You're raising a legitimate concern, but there's no way for you to know the severity of the problem with any certainty. The problems you're concerned about *might* be nearly resolved, but the trends so far aren't very promising. Is this mission in trouble? Is it at risk of becoming a zombie project? Since you can't be

sure how many “serious problems to be found” there may be, it’s difficult to take a more forceful stand when confronted by the manager’s mix of optimism and avoidance. Ironically, the same manager who’s setting up communication barriers in this exchange will also be the first to ask, when product shipment is delayed, “Why didn’t you tell me sooner?”

These bad news barriers exist to a degree in all organizations and on all projects, and the zombie projects lurking in your company *depend* on those roadblocks—it buys them some time, giving them a chance to grow. Getting the message through these barriers is hard work, and there’s no silver bullet, magical process, or communication tool that will single-handedly guarantee victory.

But there *are* some practical things that can be done to improve the communication between the people who have the information and the managers who need it to support their decision-making process. Before we talk about specific tools and strategies to improve how your organization communicates bad news, truth in advertising requires a disclaimer:

Disclaimer: The following tools are effective where we can assume that an organization and its management are behaving in a relatively rational manner most of the time. If you are working for an organization or manager that is irrational most of the time, you have some career choices to make. If there is doubt in your mind about the rationality of your organization or its management, trying to use these tools may help resolve the ambiguity (for better or worse).

Communication barriers—culture, skills, fear, and uncertainty—work together and reinforce one another. Likewise, the tools you use to address those barriers must be integrated as well.

Agreeing on a Context for Information Sharing

Most organizations don’t erect these communication barriers intentionally. They emerge instead over time like weeds growing along a path. When

you know that delivering the message involves a trip through the sticker bushes, that tends to discourage you from making the trip. That in turn allows the stickers to grow taller and broader, which makes the next trip more uncomfortable, which discourages future trips...until the path is gone and all that’s left is a seemingly impenetrable bramble (prime breeding grounds for zombies).

So how do you prevent that communication-strangling cycle from taking hold? Nurturing a good relationship with your manager is critical, no matter your position in the organization. Your manager’s job is to develop and implement a system, and to control the priorities and resources of the organization. Your job is to define, plan, and manage your portion of the effort, and to look for a credible way to do it successfully within the schedule and resources allocated to the effort.

You and your manager have to communicate if both of you are going to do these jobs well, and it’s important to establish a context for that exchange of information with the manager you’ll report to on the project. One of your most important meetings should happen at the very beginning of the project.

This is a critical meeting in which the definition of the **effort** and the definition of **roles** are first explored. To be effective, this discussion needs to be relaxed and direct. Getting away from the trappings of the manager’s office (the credenza, secretary, and that BIG desk) to engage in one-on-one dialog is essential. Some questions may be perceived as insubordinate or challenging of your manager’s authority or wisdom...particularly if asked in a public forum or in an environment that encourages the wearing of the “boss” and “staff” hats. The goal of this discussion is to lay a foundation for defining and communicating about the project. It also provides an opportunity to reframe traditional cultural roles. I prefer to approach this dialog in a casual setting, such as the local burger joint. (That’s why I like to call it the “Cheeseburger Talk.”) During the meal, engage your boss in a discussion about the boundaries, the constraints, and the relationship the two of you will have during the project. (See sidebar for a basic set of Cheeseburger Questions.)

Cheeseburger questions provide the context for the effort, define the scope, schedule, and resource boundaries, and provide an opportunity to discuss risks and roles. The questions may look simple, but I’m surprised how often managers can’t answer these “simple” questions for efforts that have been underway for months, or how many managers aren’t clear how *their* manager would answer.

Discussing risks up front—by asking questions and using a historical context for the discussion—can normalize the discussion of risk and get past some cultural taboos. Introducing the notion of risk early on lays a foundation for addressing it later, in the project’s planning stages.

“Relationships” questions invite reflection about the roles that you and your manager expect to play on the project, and provide a foundation for change and issue management. Openly discussing delivery of bad news gently reinforces the notion of discussing project risk in a nonthreatening way, reminding the sponsor that risks must be addressed promptly if you’re going to avoid creating zombie projects.

The Cheeseburger Talk also gives you and your manager a chance to define the cultural rules for this effort. The role that I try to establish and reinforce is that I am one of the manager’s trusted lieutenants, responsible for managing a portion of the effort and providing feedback about how that portion is going. My job is to attempt building credible plans to accomplish the effort within specified bounds, manage to those plans, and promptly notify Management if I come to believe that my portion of the effort cannot be done to specification within the time and resources allotted.

An important point about the Cheeseburger Talk is that it **does not** establish how long the project will take, how many resources will be required, or whether or not it will be successful. It’s too early in the game to know those things.

It **does** attempt to capture Management’s *expectations*. At the conclusion of the Cheeseburger Talk, I will reflect what I believe I heard in a “definition document” or charter for my portion of the effort, and then re-

view the document with the manager to validate my understanding.

Planning—Can We Get There from Here?

Once definition has been agreed upon, the next task is to attempt to create credible plans for the effort as defined. The word “plan” originated from a French term for ground plans or maps. Can you build a marked map to get from where you are now to your destination? Can you build a credible plan that describes a way to accomplish your portion of the project within the schedule, scope, and resource boundaries requested by Management? If the answer to these questions is “no,” then that’s essential information—and it means that the project has a problem that should be addressed.

If you don’t see how to fit your portion of the project in the box, you have several options. Some of them are proactive, and some of them are pro-zombie.

The Ostrich Approach Stick your head in the sand. Hide the evidence that the project as defined does not seem doable, and hope that you’ve made a mistake in your calculations somewhere. This approach does not address the problem and denies your manager and your organization a chance to proactively address issues with the project.

The Prima Donna Approach Make your manager feel incompetent. Interrupt a senior staff meeting by loudly proclaiming that the manager is an idiot for imagining that the project could be done with acceptable quality within the schedule and resource constraints identified. This approach delivers a useful message in a useless and destructive way. Managers—perhaps even including you—sometimes have mistaken assumptions about the size and complexity of work, and about the resources and time required to get it done. We *do* need to know when our assumptions are incorrect, but no one likes to be told that they’re wrong (or foolish) in front of an audience. Messages that aren’t delivered diplomatically usually aren’t heard, because the recipient

is too busy defending against the brutality of the delivery.

The Humble Messenger Approach

Promptly arrange a one-on-one meeting with the manager to review your definition of the work and your current plans, explain your concerns, and ask for assistance. The Humble Messenger is a more effective communicator than the Ostrich or the Prima Donna. This approach is not without its challenges, however. The frankness of the approach can evoke fear from you *and* your manager. It runs contrary to some cultural rules and requires skillful presentation. It’s also difficult because it’s hard to be certain that the project isn’t doable as defined. Remember, you aren’t saying the task is impossible, you just haven’t figured out how to do it yet.

Let’s explore how a Humble Messenger might skillfully deliver the message and overcome the communication barriers. (In envisioning this approach, we’ll assume that you’ve made an honest effort to define your portion of the project and to develop credible plans to perform the work, using your standard development practices within the time and resource constraints discussed as part of the Cheeseburger Talk.)

First, remember that your manager is not foolish. When you had the Cheeseburger Talk, you discussed your manager’s goals. You aren’t saying these goals are silly or invalid; what you’re saying is that you’ve looked at the work in detail and have concerns about whether the work can be done within the specified constraints. Here’s a hint: Never tell someone “This can’t be done.” Pronouncements like this suggest that the person who asked for the work was foolish for wanting it and that you’re smarter than they are. It also invites an irrational and emotional argument along the lines of “Can too!” “Can not!” “Can too!” What’s needed is a discussion of the data available, your assumptions about the work, and any concerns you have based on that data and those assumptions.

An effective approach might be, “I’ve looked at the project in detail and I’m having trouble describing a credible way to accomplish the work within the boundaries we discussed. Let me

show you what I’ve got so far and maybe you’ll see something that I’m missing.” This invitation is not only hard to argue with; it invites a discussion of the data (the news), rather than how people *feel* about the news.

If you can’t describe a credible way to get from where you are now to where you want to be, your manager has four options:

1. Tell you “Failure is not an option” or “You’ll just have to find a way” and wait for you to slink away saying “I’ll do my best.” This is irrational behavior, ideal for incubating zombies.
2. Discuss changes to the schedule, scope, or resource constraints of the project until the effort seems doable.
3. Cancel the project before it graduates to zombie status.
4. Find someone who *can* build a credible plan.

The last three responses are all reasonable outcomes of problem solving. If I was working for you and didn’t see how to accomplish your objectives within your specified constraints, when would *you* want to know?

If you’re able to build what you believe is a credible map to the objective, then you’re ready to begin the journey—and navigate by using your plans like a map to chart your progress.

Navigation—Tracking Progress and Reporting

Navigators know that course corrections are part of any journey. The point of planning wasn’t to build a perfect map, but to establish reasonable expectations and take a clear look at the assumptions upon which the plans are based. Once you’ve set baseline agreements for scope, schedule, and necessary resources, you’ve set the stage for later discussions of variances. That allows you to make corrections later, as circumstances and assumptions change.

Progress on the journey toward project completion will be measured in terms of the same three factors

used to describe the effort: scope, schedule, and resources. Periodically, you must assess:

- **Scope**—Are we doing what we thought we were going to do (creation of work products, quality of work products, speeds, feeds, features and functions, process compliance, and consistency)?
- **Schedule**—Did it happen when we thought it would happen?
- **Resources**—Did it cost what we thought it would cost (in terms of both human effort and money)?

The goal of monitoring progress against expectations on a regular basis is to identify variance. As you detect variance from the expectations, you talk about it with Management—just as you agreed you would in your Cheeseburger Talk. This status reporting encourages everyone—Management *and* you—to compare the results to expectations and adjust from there. If expectations are holding up, you can proceed with the work and monitor your progress. If expectations are inconsistent with results, you can discuss the variance with Management and consider changing either the approach or the expectations.

These are the fundamentals of process control. The key is to clearly establish expectations about the project, and to define your role in tracking against these expectations.

The Land of the Living

The battle to keep your organization's projects in the land of the living is a never-ending one. To be successful in that fight, Senior Management needs to effectively sponsor healthy projects. They also need to be able to identify true project zombies and put them out of their misery when necessary. The only way they can do that is if their line managers provide them with timely and accurate information that will support their business decisions—information that can rise above the barriers of culture, skill level, fear, or uncertainty.

To conquer those obstacles, you need to get an honest answer to this

question: *"If I didn't believe this project were going to be completed to your quality specifications within your schedule and resource targets, when would you want me to tell you?"* That's the most effective question you can ask of Senior Management during your Cheeseburger Talk. In my ten years of asking this question, no one has ever said anything that varies much from *"As soon as possible."* Some managers have asked, "Don't you think this is doable?" to which I reply, "I'm not sure. We'll have a better idea of that when we've finished defining the work and building the plans to get it done. If it doesn't look feasible at that point I will let you know."

Many managers are willing to end the conversation there, but I try to make sure my role in the project is clear: "As we progress, we'll learn more about the project. We'll monitor our progress compared to our plans and quality standards using the processes we have established. If at any point we appear to be having trouble meeting our goals, or if new information suggests we have a problem, I will let you know promptly." Most managers are relieved to hear this.

This exchange addresses the cultural bias against discussing failure by reframing it as a promise to deliver news promptly. It anticipates and relieves some of my fears about delivery

The Cheeseburger Questions

Reality-check questions to ask your manager over an informal lunch

Scope of the effort

- What do you want my portion of the project to accomplish?
- Why is our organization interested in doing this project?
- How will we know that my portion of the project is complete?
- How will we know that my portion of the project is successful?
- What standards and processes will be used to assure that my portion of the project meets your needs?

Schedule

- When do you expect my portion of the project to begin?
- How long will I have to complete my portion of the project? How was that timeframe established?
- What is the impact if my portion takes two weeks longer than your target?
- What is the benefit if my portion takes two weeks less than your target?

Resources

- What resources are you willing to commit to my portion of the effort (people, equipment, materials, facilities, money)?
- How were the resource targets established?

Risks

- What do you see as the biggest risks facing the project?
- What kinds of problems have we had on similar projects in the past?
- What are we doing to address those problems on this project?

Relationships

- As the work progresses, what status information would you like to receive?
- How often do you want regular status reports?
- How shall I contact you if I have questions or issues with the project?
- Who is authorized to change the schedule, scope, and resources of my portion of the effort once we have begun?
- If at any time I have concerns about the viability of the project, do you want to know?

of bad news later, because I know I am delivering a message that was requested, and it reminds my executive sponsor or manager that *they want to know*. Agreeing to plans, standards, and practices up front addresses some of my concerns about imperfect information because it provides a somewhat objective foundation for me to offer my imperfect opinion.

Sincere questions asked with a desire to provide good service are difficult to ignore. Once the communication channel is open, establishing

clear goals and setting expectations in plans is a good way to leave the door open for continued communication as the project unfolds. And that open door—along with the timely and accurate exchange of information it encourages—may be your best weapon against projects that go bump in the night. *STQE*

Payson Hall (payson@catalysisgroup.com) is a consulting systems engineer, project management consultant, instructor and speaker from

Catalysis Group, Inc., in Sacramento, California. Formally trained as a software engineer, Payson has performed and consulted on a variety of hardware and software systems integration projects in both the public and private sectors throughout North America and Europe during his twenty-year professional career.

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