OSSOP!

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WHO'S WHO?

Mr. John Jackson was Executive Vice-President of Information Technology Group at one of the leading life insurance companies in the region. He was a renowned programmer who had more than 25 years of work experience in various technical fields, and had been with the company since his career began. Two years ago he was promoted to a management position after the sudden and tragic death of the previous vice-president, who was also his mentor.

As the new executive, John oversaw the big picture of software projects, and led more than 70 programmers, computer engineers, and technicians in his department. Historically, more than 30 software projects were executed each year mainly to support the company's business units. However, more than half of them failed either because they were completed late, over budget, missed functions, terminated early, or combinations of any of these. John urged changes as he saw a lot of room for improvement, one of which was definitely in the project management area. He decided to hire an experienced consultant to give him recommendations on how to start.

Mr. Sammy Lee was a young independent consultant, and expert in project/program management. He was hired to help John develop a project management methodology and a simple tool to track all project status in the IT department. Sammy was born in Singapore, and was not familiar with the corporate culture at all.

THE COMPANY BACKGROUND AND CULTURE

In 1969, the company was founded as one of the very first locally owned businesses with the absolute goal to provide security and protection for families in the region. The company underwent major changes in the organizational structure and management system during the 1980s, leading to a new foundation for modern and efficient operation in many respects. The company has seven divisions including claims, human resources, finance, investment, and accounting departments, a medical center, and an information technology group. In 2008, the company assets were around $300 million, maintaining their ranking as the leading life insurance business in the region.

Under John's supervision, the Information Technology Group (ITG) focused on solving the challenges faced by growing insurance businesses. The ITG organization was structured into two main subgroups: software and hardware teams, with a total of 80 employees. The uniqueness of the ITG laid on a strict policy of using open source software, which was the original source code available to the general public for use and/or modification "free of charge." In particular, no commercial software, especially those with license fees, was allowed in the company at all. John called it the "OSSOP!" policy (**O**pen **S**ource **S**oftware **O**nly, **P**eriod!). And because of the OSSOP! policy, the company saved millions of dollars last year. And the CEO was very pleased to see the OSSOP! continue.

FIRST MEETING WITH THE EXECUTIVE

John: I'm very pleased that you decided to take this job. Our group is in need of fresh ideas, especially with regard to the implementation of a system for project management. I am sure you can help us.

Sammy: Thank you. It's my pleasure. First of all, if I understand the contract correctly, you'd like me to develop project management methodology and tools in your group for improved business results. You'd like to standardize the way your project managers manage their projects, and be able to regularly track the status of each individual project. Is that right?

John: Yes, currently we do not have a systematic tool or standard for managing projects. Each manager manages his or her projects from personal experience. And if you notice, there is no person designated as "project manager" in my group. Senior programmers who have more than 10 years of work experience are usually assigned to be responsible for success of the projects. That's the way we have been doing it. But now I want to change it. Here are the formal documents that we have for project management. Not a lot, as you can see. Hopefully, they will give you some ideas of our business and how we run it.

Sammy: Okay, so let me go through these documents tonight. Also, I'd like to talk to your people sometime this week. Would you please arrange that for me?

John: Sure, I can do that.

Three days later, Sammy met seven people who had assumed project manager roles. He discovered several interesting things. First, each manager had his or her own distinct way of managing projects. Second, all of them claimed that they had important projects, and the resources were inadequate. Third, there was an inconsistency among the tool utilizations. Some managers used open source

spreadsheet programs[1] to schedule their projects. Many did not do scheduling at all. They simply forecasted the schedule based on their experiences. Why didn't they use an open source program to do that? Mainly because they believed open source software was not sophisticated enough to do scheduling. Their complaint was "It's darn slow!"

Sammy learned from the interviews that John held the monthly meeting to get project status reports from all managers, and that was the only meeting associated with project management. If there was an urgent problem that couldn't wait, most managers went directly to John's office and requested support informally. Most of these were sorted out, but some weren't because as an executive vice-president, John was very busy. What happened was that some issues were neglected, and so no follow-up was initiated in many cases, especially those with low priority projects. Of course, this was not John's fault. Simply, it was the system and approach that prevented John from providing support to everyone every time it was needed. Fortunately, John was more than ready to make a move. In fact, it was the best time to make changes because people perceived this time as crisis, due to the high number of projects that failed last year. And with crisis often came opportunities.

SECOND MEETING WITH THE EXECUTIVE

Sammy: Now I understand both your concerns and your people's concerns. Overall, I think your managers are frustrated with the speed of open source software for project management simply because it's relatively slow. They'd actually like you to consider purchasing commercial software licenses because they believe the commercial ones are much better. But they didn't want to say it out loud because they know it is against your OSSOP! policy. They wanted me to talk to you.

But you know what? I don't think commercial software is so much different from open source in terms of the critical features. Although not sophisticated, many open source software can very well handle constructing a network diagram, identifying a critical path, and so on. So I believe your people think open source software is slow because they don't know how to do scheduling properly. They've never been trained. This is fine. I can set up a training session for them.

But first of all, I strongly suggest you to consider establishing some criteria for project classifications. Your managers don't have consistent ways of managing their projects. Big or small projects were managed differently depending

[1]In this case, the term "program" refers to written programs, procedures, or rules pertaining to the operation of a computer system, and wasn't used to indicate a set of interrelated projects.

on each person's experience. To develop and implement project management methodology, we need to have a *documented* approach for performing project activities in an *accountable*, *consistent,* and *repeatable* manner. We need everyone's buy-in on this.

According to the information I learned from the interviews, I would suggest dividing your projects into two groups. One group is called "high priority" project bucket and the other "low-to-medium priority" project bucket. And we can use these criteria to filter our projects:

- Business Alignment
- Regulation-related Effort
- Security Impact to IT System
- Business Impact on a Large Scale in Terms of Company Revenue

These criteria were identified during the interviews days ago, waiting for your approval. Any projects that fit into one or more of these criteria will be called the "high priority" projects, and these are what we need to pay attention to the most. Those that do not fall into any of these criteria, which are the majority, we'll call them "low-to-medium priority" projects. I drafted the initial guidelines for managing these projects. Please take a look.

Guidelines for a Low-to-Medium Priority Project (Subject to Change)

1. A project manager is required to identify an expected completion date.
2. A project manager is required to report the status at the end of the project life cycle.
3. A Gantt chart is optional.

Guidelines for a High-Priority Project (Subject to Change)

1. A project manager is required to identify major milestones (and dates) *and* expected completion date for a project.
2. A project manager is required to report the status at each major milestone.
3. A Gantt chart and critical path determination are mandatory except if a project has a very short timeline (less than two months for software development projects and three weeks for hardware projects)

John: I think we will have to refine it a little. Let me call a meeting with my people next week. But this is a good start.

Sammy: Sure. I'd like everyone to get involved and agree on the approach. Second, I'd like to recommend a concept of project dashboard as the monitoring and controlling tool for all projects. The dashboard concept has been widely used recently as an indicator to show the status of each project using colors.

Basically, the commonly used colors are green, yellow, and red, like a traffic light. A green means projects are doing fine. A yellow indicates a heads-up. And a red means management help is immediately needed. We can also use as many colors as you wish. There are many commercial software packages on the market that do the work very well. But I know this is against your policy. So I suggest we develop one of our own on the spreadsheet (see Table 17.1).

Of course, you can add more information that you think appropriate to the dashboard like the project customers or the size of the project team. This is just a draft. This dashboard should be stored in the network location that everyone can access. Each week, let's say every Thursday, you require all of your project managers to provide their input to the dashboard. Then, Friday morning you'll be able to view the status of each project online.

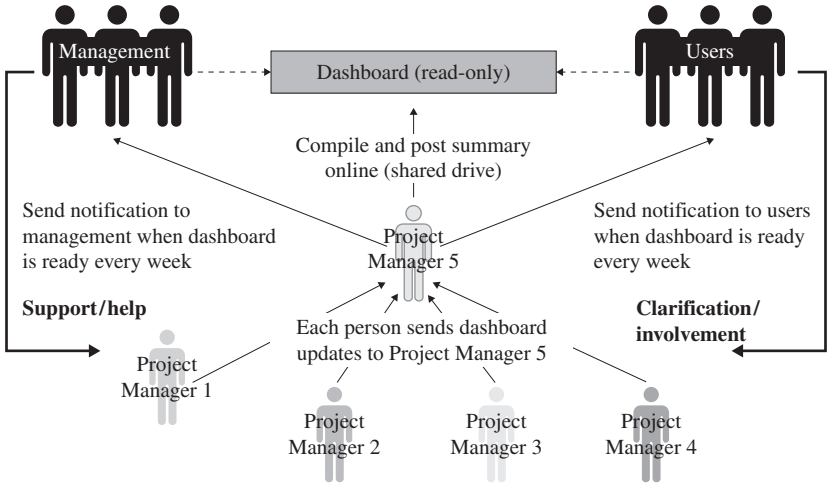
John: How are we going to do this? If we store this dashboard in the directory that everyone can access, it means someone or everyone can mess with it.

Sammy: That's true. So I recommend you assign someone to compile all the inputs from the project managers. Let's say Project Manager 5 (PM 5) is assigned to be responsible to collect the dashboard data from Project Managers 1 to 4 (PM 1 to PM 4). PM 5 will put the collected information on the dashboard every week. Once the file has been updated, it will be made as

Table 17.1 Dashboard Example

Project	Brief Scope	Status If Yellow or Red, Explanation & Corrective Actions Are Needed	Priority	Responsible Person (Project Manager)	Expected Finish	Budget
Barcode Initiative	Create a barcode system to store employee information and use with the employee badges	Green	High priority	Mr. John Doe	December 2009	$76,000
Online Statement	Create an online system for customers to view the statement and request for help	Green	Low-to-medium priority	Ms. Jane Doe	September 2009	$62,000

Figure 17.1 Reporting Concept



read-only before being saved to the network to prevent further corrections and/or accidental modifications. Then, PM 5 will send a notification to you that the dashboard is ready to be viewed. This is also a way of limiting the requirement changes during the development phase without your approval. Here is the idea (see Figure 17.1).

I also strongly encourage opening this dashboard to your customers. They are internal customers, right? So they should not have any problem in accessing this file, if you grant them access. You know, there's a lot of research identifying customer involvement as one of the top success factors in software development projects. This dashboard will be one way to increase the degree in which the customers will get involved. They can come to the dashboard any time, and if they have questions or suggestions for your project teams, they can contact your teams directly.

John: Okay, that sounds doable. Let me call a meeting, and see what my people think about it.

Discussion items

1. In managing software projects, to what extent do you agree (or disagree) with the OSSOP! policy? Why?
2. What do you think would be the next step? What would be the team's reaction to the new approach to project management tools?

3. Do you think Sammy's recommendations would work? How would you amend these recommendations? What sort of additional channels could be used to make the dashboard more visible in addition to storing it on the network drive?
4. What would be the major challenges in implementing the project classification method and the dashboard concept for monitoring and controlling purposes? How would you overcome such barriers?