***Instructions:*** *The remediation plan can be simple but should clearly document the steps that will be taken, by who, and by when to get the project back to Green status. The plan should be shared with the entire PPM team immediately upon development. Do not wait until the next meeting. This process creates a higher level of commitment and accountability.*

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| **Project Assessment Process** |  |
| 1. **When a project is in Amber status, perform the following steps:**
	* If a project is Amber: PM and Sponsor must develop a remediation plan within 1 week to get the project back to Green. Plan is reviewed with the Portfolio Manager and then sent broadly to the entire PPM team.
	* If the project proceeds to Red: PM, Sponsor and Portfolio Manager meet to develop a more detailed assessment of the project (use Assessment Checklist) and then develop a thorough remediation plan.
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| 1. Collect project stakeholder feedback using interview form. Meet with stakeholders to assess project status, how the project got off track, support needed to get the project back on track, and gaps in the project management process.
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| 1. Conduct a project assessment using the project assessment checklist. This is a mandatory step to provide a neutral fact-based assessment of the current state so that a remediation plan can be developed.

The person performing the assessment may or may not have any background on the project. In many cases, he or she is an **outside party** that has good assessment and recovery skills, but he or she may not have any specific background on the project itself. Everything about the project should first be validated; no initial assumption is safe from scrutiny. |  |
| Review project documentation for completeness. |  |
| 1. Conduct a SWOT analysis using the template and guidance to determine where energy should be spent and discover root causes.
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| Determining if the project can be turned around in a timely manner and maintaining a positive return on investment (time, focus, energy, resources and lost opportunity cost). |  |
| Use the project assessment to rank order all findings and determine which findings should be addressed.  |  |
| 1. Decide if the project can achieve the intended business benefit while still providing the appropriate return on investment. If so, proceed to building the recovery plan.
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| **Project Remediation Process** |  |
| 1. Clarify or modify scope and business goals to align with realistic targets. Revisit charter and business case.
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| 1. Communicate the clarified business goals and desired outcomes to all stakeholders and ensure understanding and agreement.
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| 1. Re-plan project to develop new triple constraints (time, scope, cost). *Note: it is important than you leverage the portfolio manager or another project manager as necessary to help with the re-planning effort when required. Another set of eyes on the planning process can ensure realistic project delivery.*
	* Redefine or clarify the Business Plan/Charter, scope, etc.
	* Clarify roles for sponsor, project manager and other key stakeholders
	* Document the recovery plan steps and ensure agreement from stakeholders
	* Develop appropriate communication protocols to ensure that the project stakeholders are informed and engaged throughout the project lifecycle.
	* Ensure that assumptions and risks are clearly documented and that appropriate risk response plans have been identified.
	* Accurately account for all issues and ensure remediation steps are in place to re-plan or minimize impact.
	* How the current project will proceed (or will it?) while the recovery project is underway (approach)
	* Obtain project approval from sponsor and other appropriate stakeholders to proceed with the remediation plan.
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| 1. Monitor project performance more closely and require a tighter governance and reporting structure for this project for a probationary period of performance.
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| 1. Remember that the remediation effort is a project in and of itself and should be given the appropriate time to develop a realistic plan that the stakeholders and project team can commit to delivering.
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| ***Preventing Project Performance Challenges*** |
| 1. Make sure that Red, Amber, Green status have very clear criteria that is followed for all projects so that you know when to trigger the remediation plan steps.
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| 1. Ensure all projects are required to report status at each Project Portfolio Management meeting and that there are strict guidelines regarding preparing detailed updates in a timely manner. All status reports should be completed.
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| 1. Require all projects that are reporting Red or Amber status come to the update meetings with a documented plan to return the project to Green, including what resources and support are necessary to ensure project recovery.
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| 1. Perform regular project audits on all projects to ensure projects are proactively retargeted if they sway off track.
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| 1. Conduct regular 1:1 updates between Portfolio Manager and Portfolio Sponsor to ensure all trends and challenges are addressed swiftly and proactively.
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