

Everything You Ever Wanted to Know About Issue Management

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Issues are not risks. Issues are disagreements, roadblocks or questions that have an immediate impact on some aspect of your project. Issues generally come in two flavors, “routine” issues and “political” issues. Most issue management systems tend to focus on the routine issues that result either from lack of information or from lack of clarity or articulation of the appropriate business practice or process. Political issues on the other hand are commonly centered on personality and power, and frequently occur as a result of disagreements about how or even whether something should be done on a project and by whom. Political issues also frequently involve the performance (or lack thereof) by one or more members of the extended project team and all too often create feelings of betrayal and compromised trust on the part of the project manager.

Much of the conventional advice given about issue management appears to concentrate solely on the routine issues. The basic advice seems to be that if you write everything down on a list you'll be 50% of the way to resolution. Unfortunately this ignores the fact that some issues can't go on a list because they're too politically sensitive and some issues need resolution so quickly it hardly makes sense to put them on the list.

The best way to handle routine issues is to tailor the tracking and the resolution process to the nature and source of the issue. Four of the most common sources of routine issues are:

Meeting or Formal Session Issues

Generally both formal and informal sessions between the project team and their respective clients will result in business issues being raised. These issues should be recorded in the minutes of the meeting but they should also be logged into the issue tracking system. The type of issues raised at this point take the form of business action items or questions which:

- Pertain to the envisioned scope of the development effort.
- Center on what is occurring within a certain business area.
- Require detailed follow-up meetings in order to understand complex processes.
- Highlight specific requested business functions and features.
- May be highly political in nature.

Work in Process Issue Generation

Another source of issues is the feedback of the project team based on their insights from the construction of the business data and process models. These issues generally take the form of detailed questions about what functionality the business units anticipate needing, what information they require to support that functionality, and the identification of the source of the required information.

The key factor to note in this situation is that these issues are all on the critical path. The use of a formal issue tracking system normally breaks down at this point because there isn't time to wait for the paper work to catch up with the pressing need to get the question answered. Two things happen as a result of this. The first is that there usually isn't a record of either the question or the resolution other than the final product and the second (a corollary to the first) is that someone will disagree with the implemented solution and complain that they weren't notified, asked or included in the process of finding the "Right" solution.

Based on experience with a number of project teams the most effective method I've found for tracking WIP issues is to configure threaded discussion software to handle them. For some reason the lack of formality in this tool offers the right atmosphere for most teams. I originally believed that the team would be unwilling to take the time to record WIP issues in any system but the perennial problem of design issues being reopened time and time again appears to be a powerful incentive to adopt some form of semi-formal record keeping.

"Management by Wandering Around" Issues

This class of issues is generated by the project management team (PM, team lead) walking around, checking in with the analysts or developers, and discussing the problems they are currently wrestling with. These impromptu discussions stimulate free-form thinking on the part of everyone, and invariably unanswered questions, new ideas, and follow-up action items all surface. MBWA issues are best tracked by using a combination of formal issue tracking, threaded discussion and an Action Required list. The distinction between the three is actually more than arbitrary. As I mentioned before, an issue that lends itself to formal tracking is usually one with some level of controversy or confusion but without polarized political issues. These issues can be tracked and numbered and in a well run project will be resolved in a timely fashion.

Those issues are that ideas, suggestions or maybe a better way of looking at things are most appropriately entered into the threaded discussion list, eventually there is some degree of doubt as to whether or not they should be acted upon at this time. Depending on the discussions that result, some of them will simply drift away (threads aren't officially closed) and some of them may need to transition into issues or possibly into a change order.

The Action Required issues are simply activities that need to be done and are recorded only to help in the assignment and follow up. These "issues" are devoid of controversy (at least initially) and would never be included in any sort of performance metric for issue resolution.

Infrastructure Issues

Some issues a project team encounters are actually part of a much larger problem and as such require a process of two phase resolution. Traditional issues of this nature revolve around space, labor rates and availability of skilled personnel, or the impact of corporate policies on the project. For example a project space issue can be resolved by grabbing any open desk anywhere in the company or by arranging to have contract or consultant team members remotely located. This solution solves Project A's requirements but when Project B tries to kick off a month later the space problem has escalated from a critical issue to a complete show stopper. The key here is that the issue will keep coming up time and time again on every project until the larger problem is solved. In general these issues are most effectively escalated to a PMO but failing that any single senior manager with the charter to resolve this type of issue will do.

Resolving Routine Issues

This is one area where the PM's savoir faire comes in to play. Every project is different but in general I've found that some things can be resolved with a phone call, some things will need a meeting and some issues can be indefinitely postponed simply through lack of attention. One reason that it's important to have a written issue list is that it provides not only a record of what was decided but, much more importantly, it allows a project manager to faithfully record any bones of contention and

then let them sit there and die of neglect. Knowing what to pay attention to and what to side step gracefully is the manage part of issue management. It's an effortless skill all good PMs have but it's one that rarely acknowledged overtly.

At the beginning of this column I began by saying that issues are not risks. In my opinion 99% of the time the only real risk an issue poses to a project is that if it isn't resolved the project will be delayed. Additionally since issues arise from a variety of sources a one size fits all approach to issue resolution is rarely the answer. Business issues and scope issues should be separated from the day to day technical and managerial issues of the project, either through using a separate system (threaded discussions) or by classifying them differently. Technical and managerial issues should be aggressively resolved and resorting to the "no one's leaving this room until we've made a decision" approach of issue resolution is completely appropriate.

Political Issues

For the most part political issues are not documented in any public forum. Very early in my career I encountered a situation where one member of my extended project team wanted complete control of the project. Her goal was to increase her political power in the company and she felt this could be done by controlling the activities of the project from behind the scenes. She told me I could do what she said; when she said it or I could find another job. The standard protocol for dealing with this type of political issues is to escalate it behind the scenes to one's sponsor for resolution.

Returning to my example, I escalated the issue only to find out that my official sponsor was terrified of the woman. Being young, pugnacious, and a little stupid I then escalated the issue to his boss for what amounted to formal mediation, only to find out that in an extremely political situation it's impossible to deal with disagreements in a straight forward, fact based manner, because the odds are good the other person is going to lie.

When I began my career in project management my one size fits all strategy for resolving political issues was the rather simplistic concept of "tell the truth" with me being the sole arbiter of the "truth". 20 years later I've realized that there are a number of other resolutions techniques available for political issues, that don't require such a black and white perspective. Four that I have used most frequently in the last several years are:

Let's make a deal

One possible method of resolution is to get the other person to clearly articulate what it would take to get them to work with you and not against you. An associate of mine refers to this as the "let's make a deal" method of issue resolution. This technique requires a PM to be able clearly define the goals and objectives of the project in order to understand where and how a compromise might be reached. The trick to this resolution technique is moving behind the "power, power, who's got the power?" frame of reference and adopting a perspective that personal ego is secondary to completing the project on a win-win basis for all parties.

A classic example of this in my experience was a particular General Manager in a very large company who didn't want an application installed at his site and took the equipment that had been installed to support the application and reassigned it to other people in his organization. The ultimate resolution of the issue was a combination of pressure from above and the agreement on the part of the project team to simply buy more equipment to replace what the GM had appropriated.

Flying beneath the radar

This technique entails identifying the source of possible political issues very early in the project and then attempting to conduct the project in a manner where the political issue isn't confronted. This technique works best when the project timeframe is very short and it's possible to "get and get out before they know you've been there". In the post mortem session on one project I was on the sponsor said to me "I don't know if I'm happy or not with how you ran the project. I'm sure you didn't do things the way I would have wanted you to do them, BUT you got it done so fast I'm left with nothing to complain about". (Their way had previously taken them 18 months to do one-quarter of what my team accomplished in 120 days).

Turning a blind eye

Sometimes a project manager will confront a circumstance on a project where they think someone is feathering their own nest. I'm not implying clear theft or anything overwhelming illegal or immoral, just a set of circumstances where the individual in question is putting their own interests ahead of the company's. In most of the cases this usually is a case of someone spending money in a wasteful or self serving manner. As a former finance person I found this technique particularly difficult to accept initially but when I was confronted with the choice of highlighting a wasted 60k at the almost guaranteed cost of delaying the completion of a \$46M dollar project by 3 or 4 months choosing to turn a blind eye became a very sensible issue resolution strategy.

Being a Good Corporate Soldier

Sometimes the only possible resolution to a political issue is to shut-up and salute because as a PM you simply don't have all the facts of the situation. About six years ago I was helping a client prepare for a breach of contract lawsuit. The software vendor had failed to deliver and my estimate was that the client had out of pocket damages at over \$4M dollars. About the time we were crossing the last "t", my client got the phone call telling us that we should cease and desist because there were circumstances we didn't understand. We reluctantly agreed. Six months later, we learned that the vendor we had wanted to sue had purchased a very large operating unit of my client's company for several billion dollars.

Conclusion

Routine issues are relatively straightforward problems on a project that can be tracked and resolved using a combination of savior faire, good judgment, and the right tracking systems for the right kind of issue. Political issues on the other hand will need to be handled with a good deal more finesse. Successfully handling political issues takes a level of objectivity which many PMs tend to lose in the day to day challenges of managing a project. The secret most PMs overlook in handling political issue is that as a PM, if you're too busy or too stressed to have the time to adequately handle theses issues with good temper and grace then its time to delegate or get some help so you can delegate.

The bottom line is that while your project may succeed based on "on time and on budget performance" your career success will be judged based on your ability to steer your project through the shoals of political infighting. The correct use of the techniques of issue management can help you deliver the right product to a satisfied customer and avoid crunching too many toes along the way.

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