

ISSUE RESOLUTION STRATEGY

Definition

A project issue is:

- a situation in which the software does not work,
- a conflict between the software and the business process,
- an issue that defies project-team consensus, or
- an event that puts the project at risk.

Purpose

Project issues need to be tracked to:

- manage “scope creep,” which can delay implementation;
- provide management with notice of problems and time to resolve them;
- communicate to team members issues that affect them;
- allow discussion by the implementation team within the constraint of the due date.

Responsibility

Project Team

The project team identifies and logs issues.

Project Manager

The project manager determines an issue’s scope and the action needed to correct the problem, then delegates project-team responsibility. The project manager also determines whether the issue needs the attention of the project director.

Project Director

The project director elevates policy issues to the steering committee.

Corrective Action Options

- No action required.
- Defer action.
- Shorten the schedule.
- Minimize the task.
- Reassign resources from non-critical activities.
- Negotiate additional resources.
- Negotiate a schedule extension.

Process

Initial Identification

Any member of the project team can identify an issue. Once an issue is identified the following entries are made in the Issues Log, an Access Database.

- The date is logged
- The issue is classified as a:
 - customization or modification,
 - policy decision,
 - gap item,
 - conversion,
 - interface,
 - software bug, or
 - action item.
- It is assigned low, medium, or high priority.
- Responsibility is assigned for clarification and for resolution.
- It is assigned a due date and a tickler date.
- The area of impact is determined (resources, time, or costs)
- The area affected is determined.
- The economic impact is assessed.
- It is assigned a status of:
 - New,
 - Active,
 - Pending – Steering Committee,
 - Closed,
 - Archived, or
 - On Hold.
- Comments may be added.

Changes

Once a project issue is initiated, the following can happen:

- Its status can be changed.
- A change date can be added in case of any change in the information in the database, such as a change in priority or the addition of comments.
- Recommendations can be made.
- Action can be taken.
- The issue can be closed.

Closed Issues

To close an issue, make the following notations in the Issues Log database:

- Enter the date closed.
- Change *Status* to closed.
- Enter any action taken.
- Add any necessary comments.

For an issue to be reopened, it must be opened as a new issue.

Within a month after an issue is closed, its status will be changed to *Archived* to keep it from being reported at subsequent meetings.

Project Status Meetings

As issues are uncovered and recorded, they will be reported during project status meetings.

- First new issues will be reported.
- Next all items still pending will have a progress status report. Newly closed items will be reported once. After the closed items have been reported, they will become archived in order to keep the issues report as short as possible.
- Finally, any new items that need to be added to the database will be reported and included as the first items to be covered the following meeting.

Issues Escalation Process

Issues that cannot be resolved by project team members will need to be escalated to the next appropriate level. In such cases the project manager will report the issue to the project director or steering committee with recommendations and information about associated costs.

These issues are include:

- policy decisions (to steering committee),
- requirements for additional resources (to steering committee),
- roadblocks, that is, issues that defy project-team consensus (to steering committee), and
- gap items, that is, items that do not fit the current Brandeis business process and require a choice between expensive software modification or a change in the business process (to project director first, then possibly to steering committee).

Items that need higher level input will be reported to the project sponsor, Peter French.

(See Appendix A for a sample Project Issue Log.)