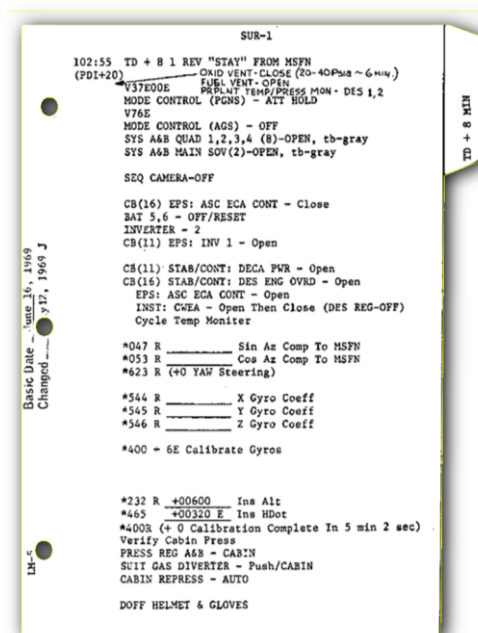


The Joy of Checklists

During the moon landings NASA used checklists for everything, they allowed the astronauts to perform complex manoeuvres confident that all the necessary steps had been considered. Checklists have been crucial in aviation for decades and are becoming invaluable in medical procedures. The band “Van Halen” used to tour with large quantities of stage equipment that all required special handling. They had an enormous contract that specified all their requirements, including one odd clause that specified that a bowl of M&Ms was to be placed backstage which contained no brown ones. As it happened this wasn’t the insane demand of a power-mad celebrity, but a check to make sure the contract had been understood (and followed). When they turned up at a new location they would first check the M&Ms, if there were any brown ones they would know to double check every one of their technical specifications.



There are those who criticise the PMI and PRINCE project management methodologies, claiming that they are too “heavy” for anything but the largest projects. PRINCE for example defines 36 different types of document, a real project manager that attempted to write all those would become so distracted by process that the project would fail. Experienced project managers know that, they just stick to the artifacts that are important for the current project, the remaining descriptions are still valuable, so long as they are treated as a checklist that can be reviewed throughout the project to ensure nothing important has been overlooked.

In the book I listed 18 of the roles defined in ITIL, before this list it does say that this is “useful as a checklist” and after it the following sentence says “even the largest oil companies would not usually have an individual dedicated to each of these, the descriptions are a useful checklist”. Despite these caveats one correspondent complained that no E&P shop would ever tolerate employing that many staff. Obviously that is true, and exactly why the word “checklist” appears in both the sentence before and the sentence after the list.

A naïve reading of PMI, ITIL or DAMA would criticise each as being too “top heavy”, as focusing on the theoretical and forcing users to spend more time designing rather than doing. Firstly my personal experience is that in fact more implementations fail due to lack of time spent in design, because inexperienced staff are always keen to start “getting something done” without worrying enough about the bigger picture. However, more important than that, the 36 document types in PRINCE and the 18 roles in ITIL (and all those other lists) have to be treated as checklists, that is things to be considered, not things that always have to be present. The effective management of subsurface data requires a level of attention to detail that is hard for even veteran implementers to sustain, in my experience reviewing good checklists throughout the process is essential.