



**Researchers into
Management**

Managing Projects in the organisation

Yvonne McLean
Inkling Training and Coaching

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What is a project?

- A project is an individual or collaborative enterprise that is carefully planned to achieve a particular aim. (*Oxford Dictionary*.)
- A project is a temporary endeavour undertaken to create a unique product, service, or result. (*Project Management Institute*)
- A project is a temporary organisation that is created for the purpose of delivering one or more business products according to an agreed Business Case. (*PRINCE2*)

Project or Business as Usual?

Project	BAU
Unique	Repetitive
Brings about change	Keeps the business running
Temporary organisation structure	Permanent organisation structure
Defined goal or outcome	Continuation of business
Has a clear start, middle and end	Ongoing, no clear end
Requires planning and / or co-ordination	Could require planning and co-ordination as routine

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Projects are about change

Developing something new

Improving something existing

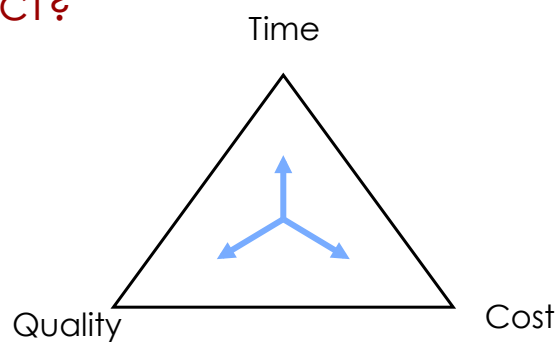
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Why Projects Fail

- Poor scheduling
- Over ambitious purpose
- Lack of clarity about what you're trying to do
- Failure to allow enough time to plan properly
- Not aligned with business needs
- Poor leadership
- Unclear lines of authority
- Insufficient resources
- Unclear objectives
- Failure to monitor progress
- Failure to evaluate results and learn from experience
- Failure to close

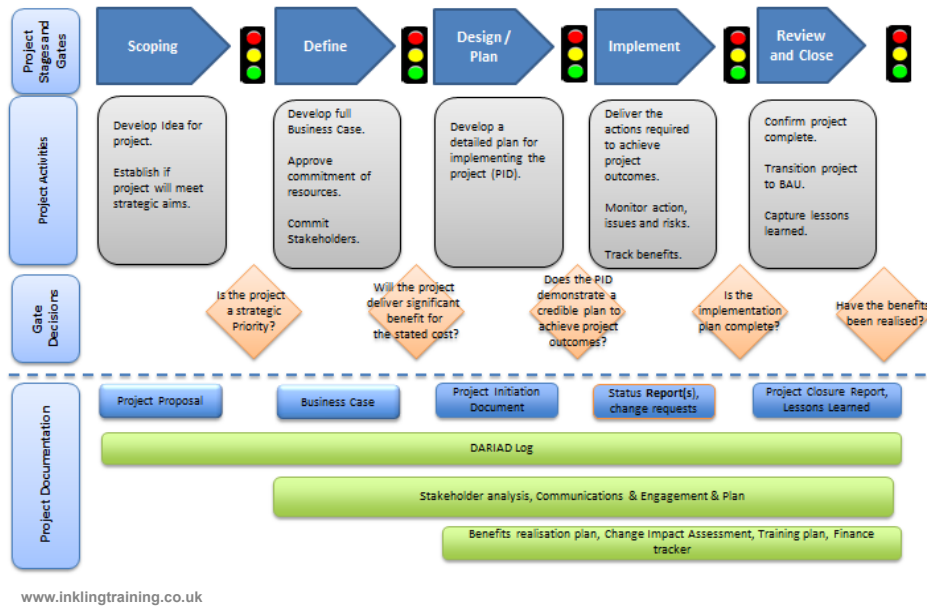
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What is a Successful Project?

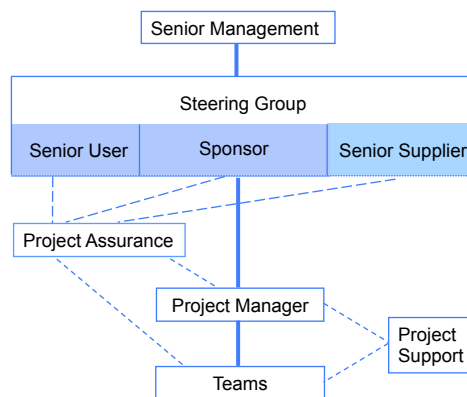


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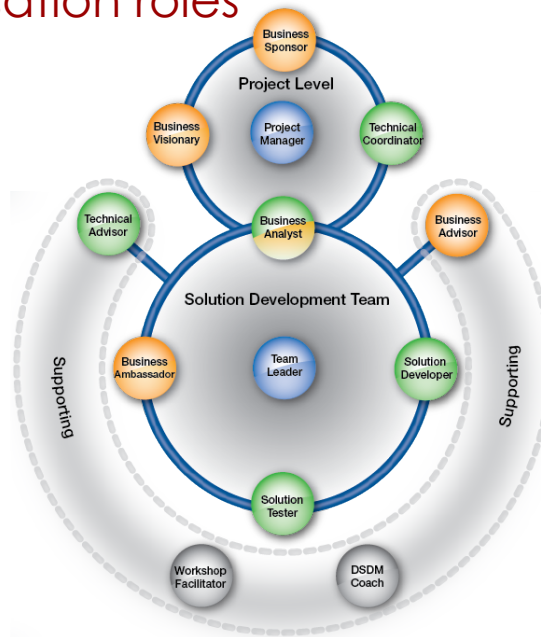
Phases in the lifecycle



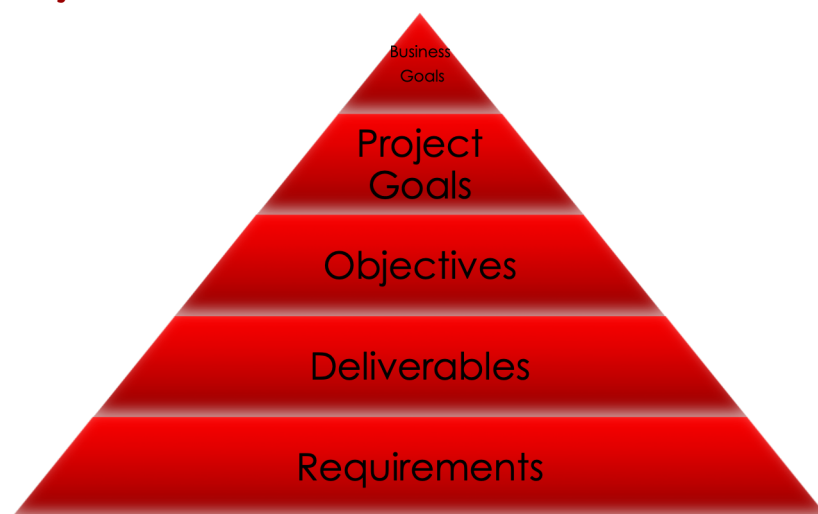
Organisation Roles



Organisation roles



Project Definitions



Project definitions

- **Business Goals**

- Where is the company / organisation going in what time frame.

- **Project Goal**

- What is the project or programme of work trying to achieve that will contribute to Business Goals? This doesn't necessarily need to be too specific.

- **Objectives**

- Influenced by goals, an objective is a description of the specific and measureable outcomes desired from a project. Activities and most likely deliverables will contribute to achieving the objective. The project and its objectives must always contribute to wider goals, otherwise the project should not be attempted.

Goals are high-level, general statements about the aims of the project, while objectives are detailed statements about what the project should accomplish.

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Project Definitions

- **Activities**

- What needs to be done to achieve the objective. An activity can be a specific action or a process, and many activities will likely be involved to meet objectives. As with everything in project management, the key consideration for activities is that they contribute directly to achieving the objective, and thereby the goal.

- **Deliverables**

- A specific, tangible product or thing. One or more deliverables may contribute to achieving an objective, but it is important not to define the objective as a deliverable. In other words, if the objective is written at too low a level, you risk creating the wrong deliverables. Rather, the objective is there to guide you and the team to determine what products or processes are needed.

- **Requirements**

- A description of features and functions. Objectives should not include features and functions.

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Key milestones

- Concept – Definition
 - Sponsor applies for funding for feasibility
- Authorisation Milestone
 - After Definition
 - Sponsor applies to authorising body for funding etc
- Handover Milestone
 - After Implementation
 - Give the customer the end product
- Shutdown Milestone
 - Signals the end of the project

Sponsor – the role

- Business leader and decision maker
- Primary risk taker
- Authority to work across functional boundaries
- Advocate for the project
- Prepared to commit time
- Experience
- Maintains a continuous dialogue with Project Manager
- Liaises with stakeholders
- Empowered and capable of addressing stakeholder interests
- Accountable for benefits identification and realisation

Project Manager – the role

- Accountable for the planning and successful delivery of the project
- Builds and effectively leads the team
- Uses resources efficiently to deliver the project
- Ensures effective communications with the Sponsor and Stakeholders
- Coaches team members when necessary
- Ensures team is competent in the use of the project management model and understands their own role in it

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Stakeholders

- Either involved in implementing the project or will be impacted by the end result of a project.
- Involvement of Stakeholders at various levels appropriate to their interest and influence is important to ensure the success of the project.

They must:

- Be able to participate in the debate defining the project concept and objectives.
- Be able to identify the benefits that will be achieved in their own area of responsibility that will be achieved through successful completion of the project

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Team Members

- Essential component of the project team
- Involved in planning and delivery – accountable for delivering a specific and agreed contribution.
- Gain commitment from other contributors
- Manage their functional and project responsibilities
- Fulfil their role and responsibilities in progressing through the project management model
- Ensure that their contribution to the projects is incorporated into their objectives and their contribution reviewed and acknowledged appropriately
- Understand their role as subject matter experts in bringing the opinions of their "constituent" group

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Launching the project

- A kick-start or kick-off meeting is really important to:
 - Communicate the Business Case
 - Emphasise objectives and deliverables
 - Assign responsibilities
 - Agree the Project Charter and Project Initiation Document (PID)
 - Draw up a more detailed project plan or fine tune the existing
- Depending on the size and scale of the project, this can be held at the end of the Define phase or during the Design / Plan phase.

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The Project Management Plan

- A series of documents which detail the planning and delivery arrangements. Even on small projects, as a minimum it should include:
 - Business Case
 - Project Charter
 - Gantt chart or schedule
- Can also include the following and more...
 - Risk management plan
 - Health and Safety Plan
 - Configuration Management Plan
 - Communications plan

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A Structured approach to planning

- Define Objectives
- Develop the Work Breakdown Structure
- Develop the Organisation Breakdown Structure
- Decide who will undertake which tasks
- Decide on the sequence of tasks (Dependencies)
- Assess task durations
- Calculate the Critical Path and project duration (Network Analysis)
- Carry out a resource analysis
- Resolve any problems of timescale and resource

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Tools for a structured approach

- Brainstorming
- Clustering by time or theme
- Work / product / cost breakdown structure
- RACI
- Estimating
- Gantt charts and scheduling

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Brainstorming and clustering

- Brainstorming
 - In a group, let everyone have a say systematically
 - Allow people to "pass" if they want to
 - Do not filter or evaluate until the process is complete
 - You can extend the exercise or move it on by writing suggestions on a post it note
- Clustering ideas chronologically
 - Place one on the wall
 - Take the next and ask "Does this go before or after?"

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Creating a Work Breakdown Structure

- A work breakdown structure is how projects are broken down into more manageable chunks
- You can show this on a gantt chart or on a separate diagram.
- If you are familiar with the topic area, you'll already have an idea how to break it down into themes that make sense to you.
- If it's a new project or you have a new group of people working together, try the silent brainstorming activity and ask people to cluster tasks into groups of activity, and then estimate start and finish dates and number of hours required per activity. Remember to:
 - Arrange sticky notes in work themes first, and then chronologically
 - Use a verb for each task – it makes them specific and tangible
 - Avoid too much detail – makes it unwieldy and sensitive to change
 - Avoid getting involved in sequence/dependency at this stage – the Work Breakdown Structure is just a structured list of tasks.

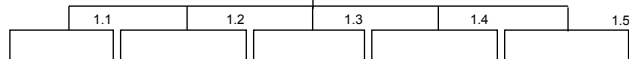
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Step 2 – Work Breakdown Structure

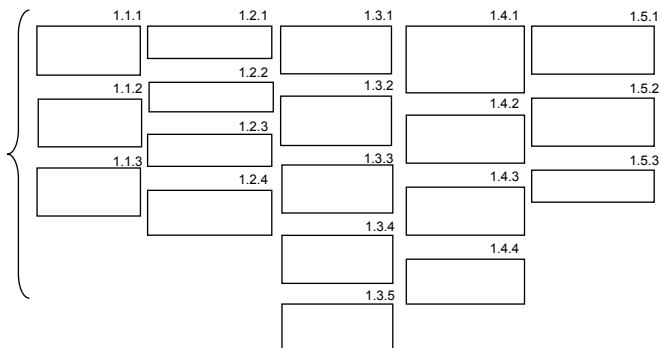
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Level 2



Level 3



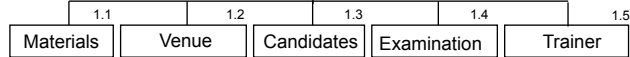
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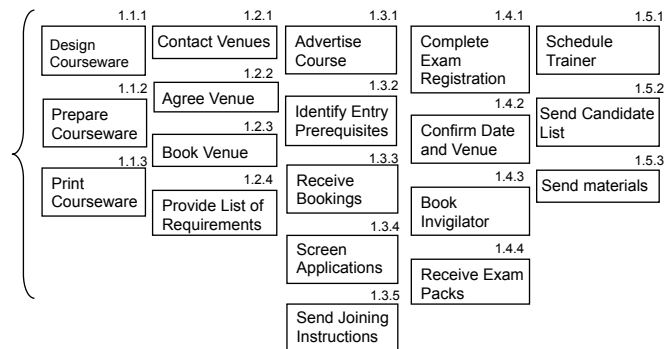
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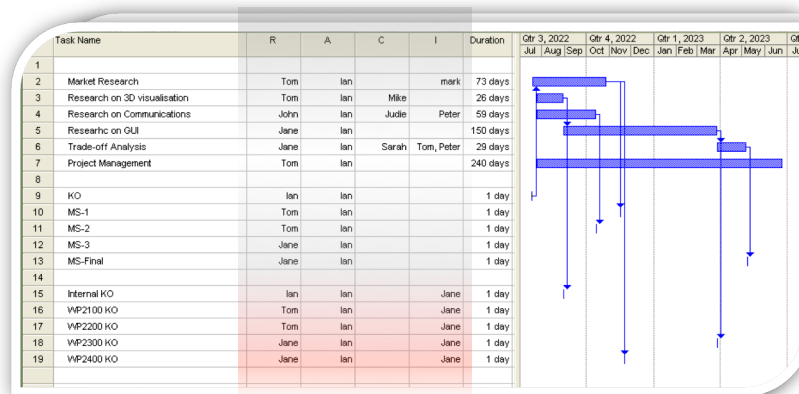


Level 3



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Gantt Chart



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Reporting Progress

Red, Amber, Green

Task	Status	Comment
Task 1	Green	Green = target achieved or on track for successful achievement.
Task 2	Amber	Amber = target at risk of not being met. Write down what the issue is and what action is being taken.
Task 3	Red	Red = target not met or certain not to be met if at a point in the future. Write down what the issue is, what action is being taken and if target needs to be re-evaluated.

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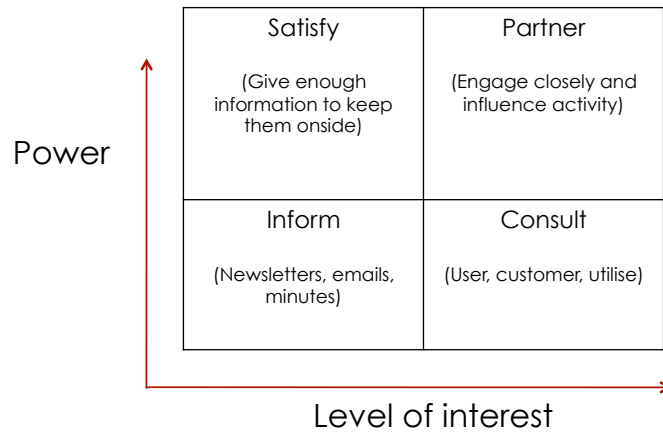
Reporting progress

Actual vs planned

Target	Actual	Planned	Variance (+/-)	Comment
Target 1 Eg Number of staff trained in new procedure by week 35	37	50	-13 or - 26%	Good for number based targets.
Target 2				Can decide on a tolerance eg up to 5% before you need to take remedial action.
Target 3				

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Stakeholder Analysis



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Communication Plan

- Derived from stakeholder analysis
- Typical content
 - Stakeholder list and contact details
 - Information required by each stakeholder (group)
 - Source of information
 - Format of information
 - Frequency of information
 - Method of distribution
- Don't forget to include the project team.

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Dealing with risk

Risk management options:

- Prevention - stop it from happening altogether
- Contingency - if it happens, have a back up plan
- Mitigate - reduce the risk
- Transfer - give the risk to someone else
- Acceptance – monitor but don't act

A risk Management Process

- 1 Identify
- 2 Analyse impact / likelihood / proximity
- 3 Create a log and action plan
- 4 Monitor and control

Useful tools for identifying risk

- Brainstorming
- Diagramming techniques
 - Cause and effect diagrams
 - System or process flow charts
 - Pre-determined headings eg: people, places, processes, equipment, internal, external
- SWOT analysis
- Expert judgement

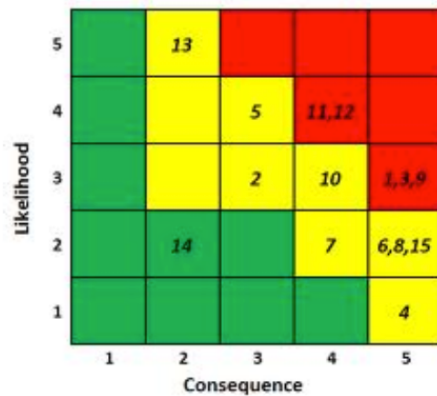
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SWOT analysis



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Risk Analysis



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Quality Control

- The means of ensuring that the outputs of a project meet the quality criteria specified for them. Essentially, that the project is fit for purpose – no more, no less.
- Techniques can include:
 - Quality Reviews
 - Visual Inspections
 - User Acceptance Testing
 - Walk Through
 - Prototyping or Piloting

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Closing the Project

- Requires a procedure to define completion
- Close-out is the same as commissioning or putting to work. It can only happen when:
 - The deliverable have been submitted
 - The objectives have been achieved
 - The customer has accepted the work
- A close-out report should include an update of the cost, time and performance data
- Remember to celebrate success!!

Project Evaluation Review

- Main aims:
 - Evaluate the processes being used
 - Establish any lessons learned and actions arising
 - Identify concerns and agree corrective action
 - Establish likely technical success of the project
 - Validate progress against time, cost, quality, scope and resources
 - Consider stakeholder relationships and perceptions

Benefits Realisation Review

- Undertaken some time after the products are in use
- Establish whether
 - The benefits have been realised (or not)
 - Any unexpected benefits have been realised
 - Any problems have been caused by the new products
- Put in place corrective action if benefits not realised