Project management bootcamp – how to deliver a successful project

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Aims of the day

- Differences between a project and business as usual
- Why project management?
- Example of a project lifecycle
- Roles in a project and the project team
- Working with stakeholders
- Effective communications
- Project planning - cost estimation, scheduling, monitoring, reporting
- Risk and issue management
- Dealing with project change
- How to successfully conclude a project
- Action planning

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What is a project?

- Start and end date
- Temporary project team
- Associated with change
- Finish date and cost difficult to predict
- Work ideally done within agreed time, cost and quality standards
- Cancelled/amended if objectives cannot be achieved
- Life-cycle ends when project is completed
- BAU is separate, more stable and ongoing - BUT strategy or core work should benefit as a result of project

When does work become a project?

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What is project management?

Using processes, skills and experience to bring about change

- Not just about planning and monitoring a project
- Motivation of those involved
- Prioritising importance of time, cost, quality - so that benefits can be delivered
- Handling change, handling risks
- Almost invisible when done well

Benefits of project management - a toolkit

- Consistent terminology - helps with reporting and assurance
- More efficient use of resources
- Considering needs of varied stakeholders
- Decision making deals with risk/change in organised way
- Better chance of delivering desired result and benefits

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Within a project, you need to balance…



and ensure these lead you towards the required benefits

Project roles and responsibilities

- Project manager
- Project sponsor
- Steering group/project board
- Project teams
- Project/programme office
- Users



Effective teams

- Good blend of skills
- Team morale and motivation high
- Everyone participating actively
- Team goals understood by everyone
- Realistic time frames
- Trust between team members



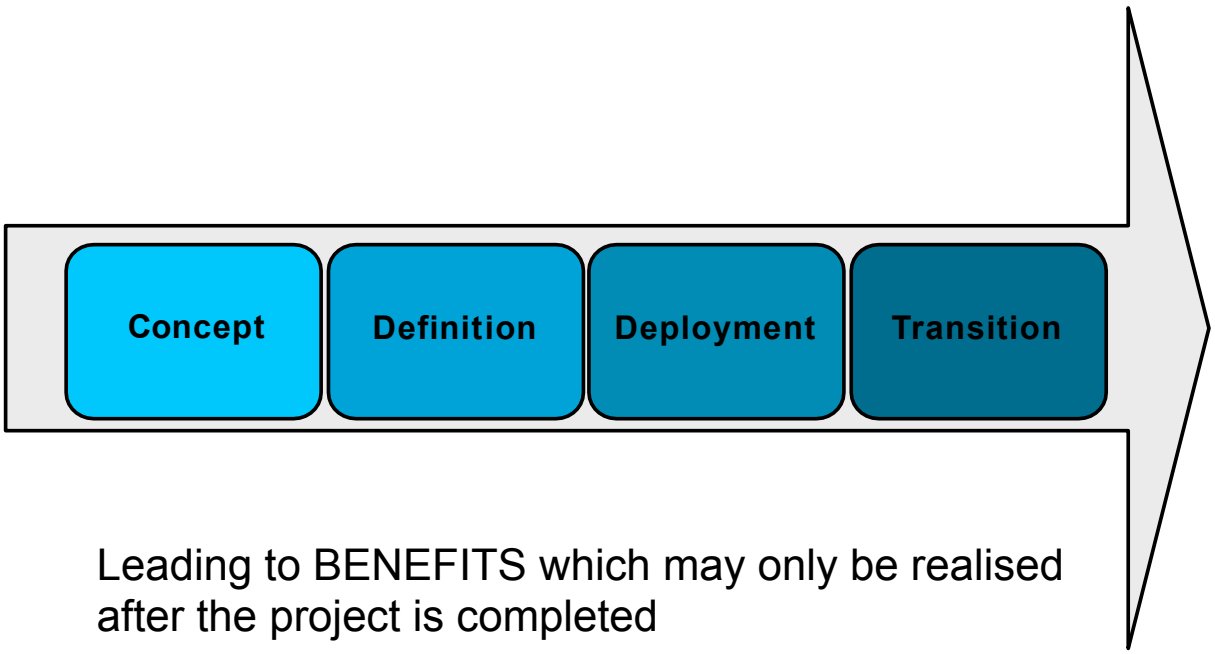
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Key leadership roles/skills of project manager

- Clarify goals
- Clarify team member roles
- Build team and maintain respect
- Motivate and maintain motivation/momentum
- Communications - clear and timely in all directions
- Effective interpersonal skills
- Political skills
- Change management skills – project will bring change
- Understanding and communicating the project's place in the organisation

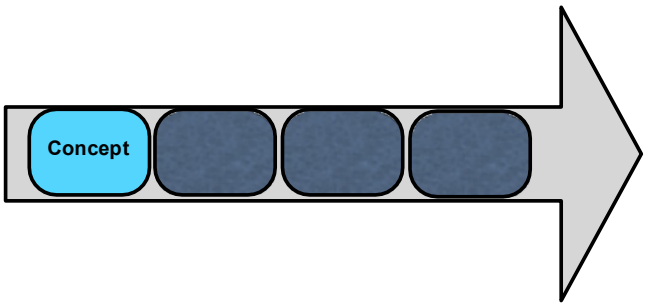
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A project lifecycle



Leading to BENEFITS which may only be realised after the project is completed

Concept



- New idea
- Development of idea
- Feasibility assessed
- Context - what's happening around us?
- Outline business case or proposal produced
- Accept or reject – formal decision at this point
- Lessons learned – note and incorporate at each gateway

Developing a project idea

What is the point of the project?
What improvements will come about as a result?

Projects need:

- Clear link with key strategic priorities
- Clear management/ownership/leadership
- Effective engagement with stakeholders
- Skills or understanding of project
- Break down development/implementation
- Evaluation of proposals driven by long term value for money, not just initial price
- To STOP if at any point it becomes clear the project is not worthwhile

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What is the point of your project?

What is the point or purpose of the project you are currently working on

(or have recently been involved in)?

Write down brief notes:

It may be helpful to think about

- How will this project link to/support our strategic aims?
- What benefits will come as a result?
- How will we know it has been done?

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Assessing the feasibility of a project

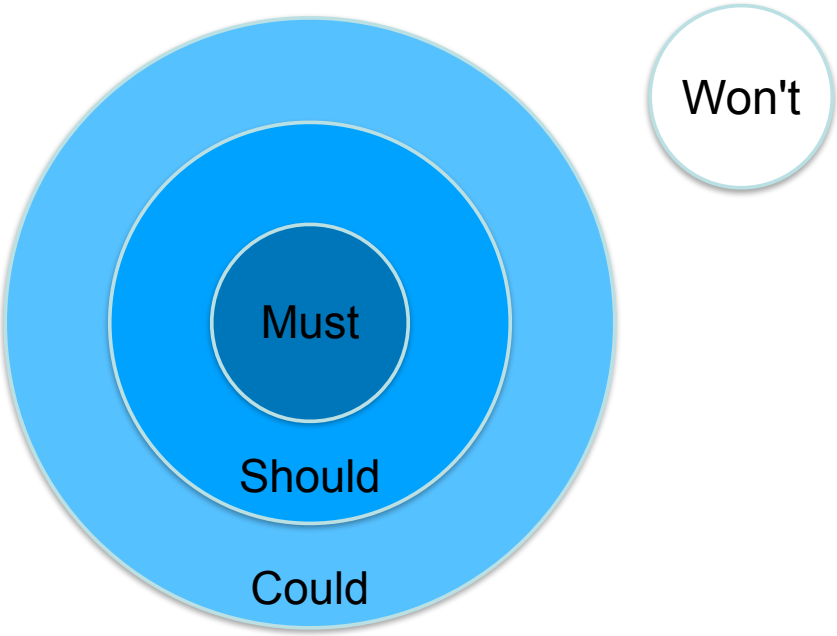
- Business benefits – identify and define
- Success criteria – qualitative and quantitative
- Consider other success factors
- Clear goals and objectives (at organisational and project level)

A project manager needs to ensure (with help of team/stakeholders)

- Overall goal
- Clear aims – where are we headed?
- Clear objectives – what might we deliver?
- Leadership – what is to be done, agreement on how it will be done, how will we know it has been achieved?
- Communication – timely and appropriate

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Thinking through core priorities - MoSCoW



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Stakeholders – who are they, and how do identify and engage them?

A stakeholder is – anyone who has an interest or role in the project, or is impacted by it

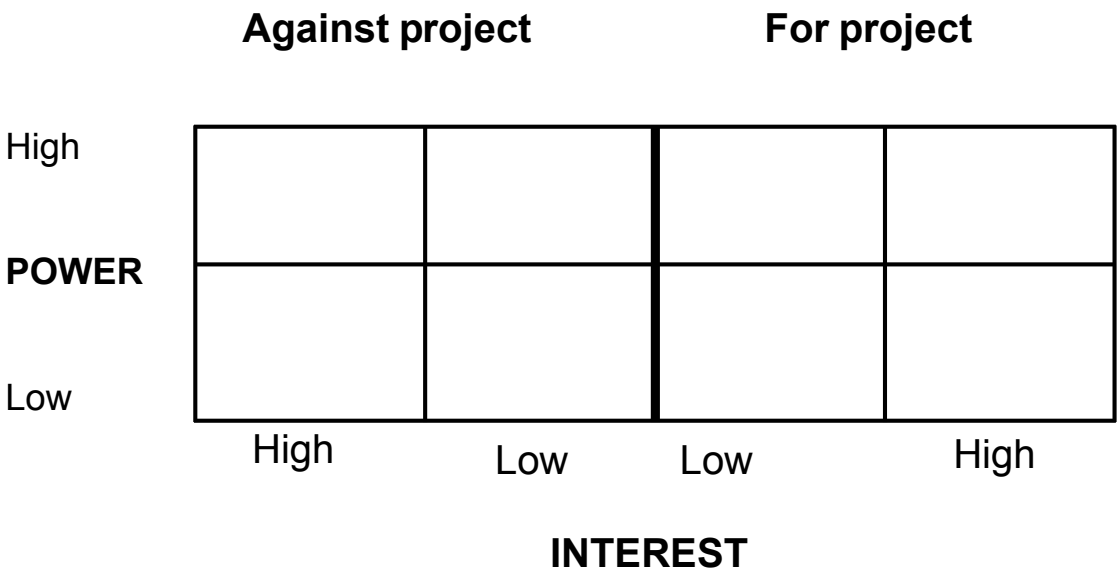
We can identify them by

- Brainstorming
- Using analysis such as
  - PESTLE (looking at Political, Economic, Social, Technical, Legal, Environmental context of the project) or
  - SWOT (look at Strengths, Weaknesses, Opportunities, Threats in the context of the project)

Stakeholders will have different levels of interest and influence.

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Assessing stakeholders



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Engaging and managing stakeholders

- Meet stakeholders to discuss their views
- Nurture the relationship – understand stakeholder concerns and language
- Be prepared to listen, respond, negotiate and feedback
- Clarity of message is important
- Recognise the optimum time to engage and how to engage
- Use powerful stakeholders for the project to persuade those against the project
- Stakeholder views and allegiances may change during the project

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Communication and reporting

Successful communication occurs when the received meaning is the same as the transmitted meaning.

Appropriate information at right time to right person and in a cost effective manner.

Consider:

- Level of involvement in project
- Reason for communication – what they need from you, what you want them to do
- Communication barriers (ways message may be interpreted)



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Communication Plan – simple example

	Project Sponsor	Key Stakeholder	Other stakeholders	Project team	Rest of Org'n	Public
Daily				Informal		
Weekly	Email update			Email update/ meeting		
Fortnightly	Face to face	Email on key issues				
Monthly	Pro mtg	Prog mtg			Company website	
Quarterly	Report	Report	Progress newsletter		Newsletter	
Ad hoc	Email	Email		Email		Consult/update?

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The Business Case or Project Proposal

What is it?

- Document which justifies doing a project after considering time, cost, risks and benefits
- Can look at different options and offer a preferred one

What's in it?

- Strategic case – background, purpose, why the project needs to be done – what is the case for change?
- Economic analysis – is it affordable to the organisation?
- Business benefits expected of the project
- Outline of scope, timescale, cost, quality, potential risks
- Management approach – roles, structure, governance – how will the project be delivered, and how will it impact on business as usual

"There is nothing quite so useless as doing with great efficiency something that should not be done at all"

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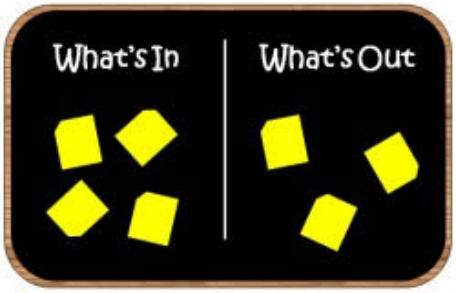
Scope of a project

Totality of

- Outputs - products to be delivered
- Outcomes - changed circumstances as a result
- Benefits - measurable improvement

and the work required to produce them

Scope clarifies assumptions
and forms a baseline for the project



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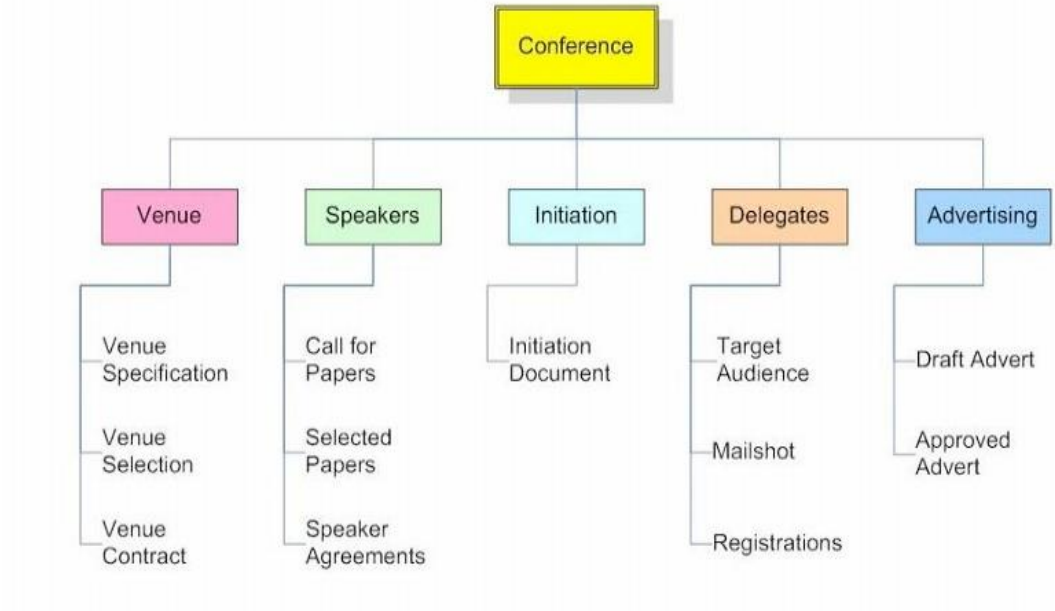
Visual Scope Planning

Planning the scope visually will help to -

- give an organised pictorial representation of the project
- put the work in manageable, bite sized pieces
- ensure you don't miss out anything
- help to identify resource risks
- outline the products to be delivered - helps plan who needs to be involved, actual work tasks, costs
- show clearly what is core and what is not included (MOSCOW), which helps when negotiating with stakeholders

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Product Breakdown Structure



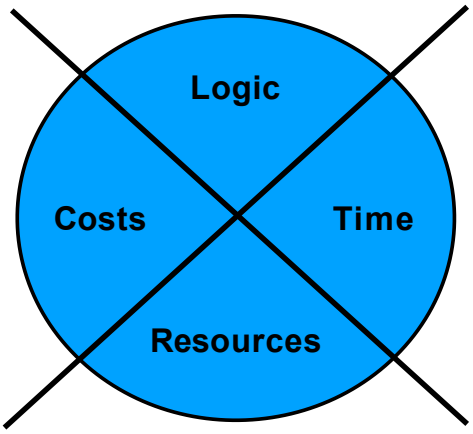
Linking things together

- Define the **products** you need
- Plan the **work** needed to do them
- Link these to **resources** needed – who is involved in each task, who 'owns' it, who do you need to talk to?
- Link these to **costs** needed – showing the cost of each task

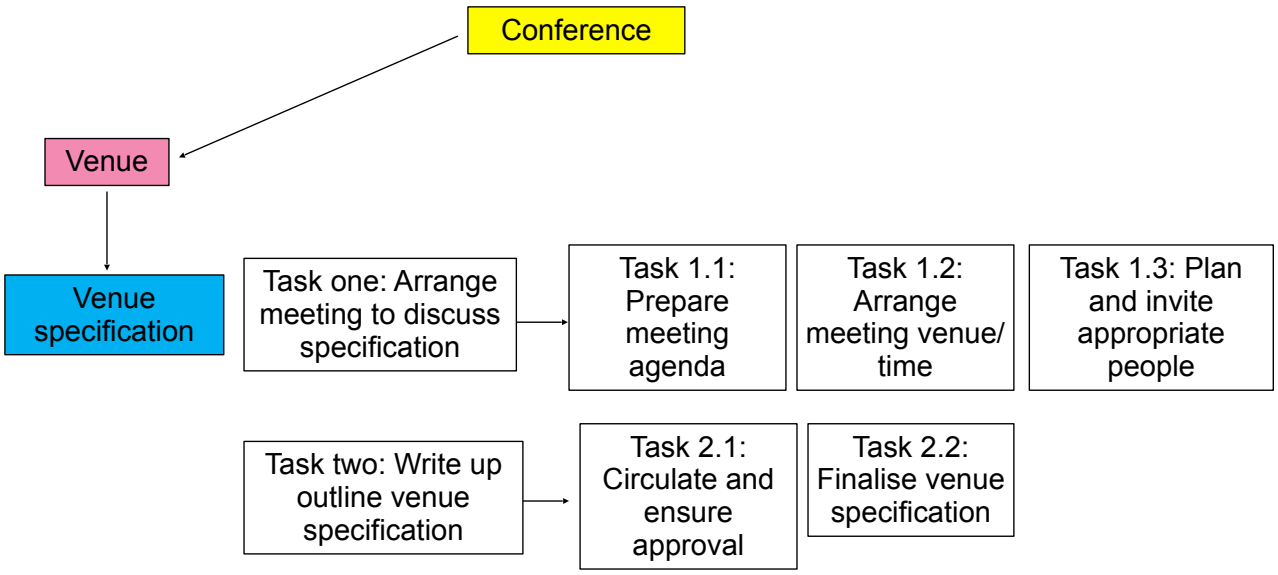
Seeing such details can help identify risks in advance and can help plan logical flow and time management

Linking tasks together

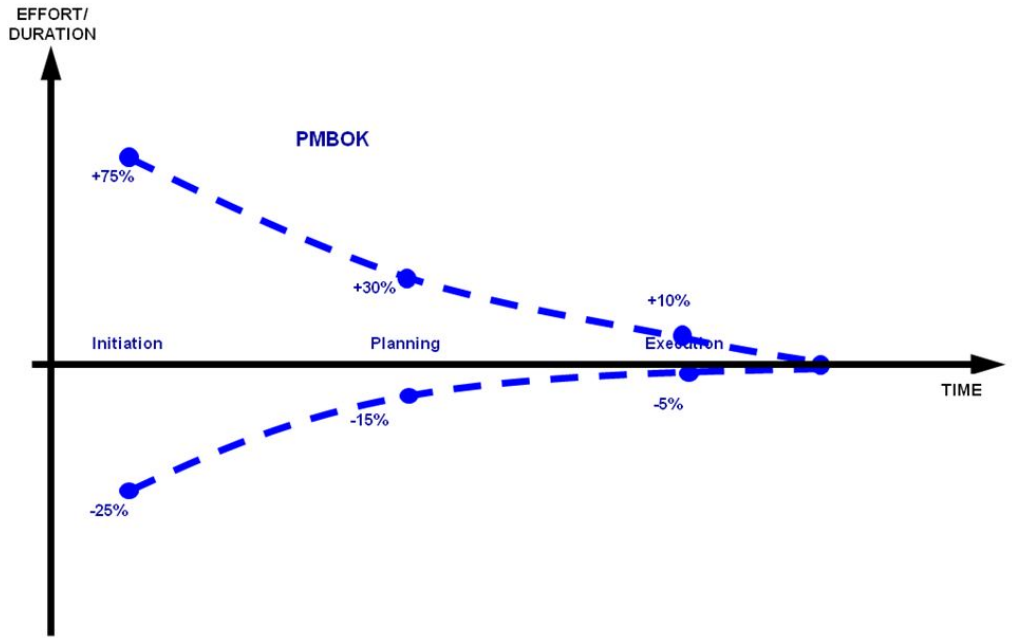
Look at each task and consider…



Linking products and tasks to resource



Don't make promises you can't keep! Cone Estimation



Risks – it'll never happen….but what if it does?



A risk is defined as

'the potential of a situation or event to impact on the achievement of specific objectives or your whole project'

We need to identify and consider risks to…

- Time
- Cost
- Quality

…and consider the impact on your project and organisation?

What to do with risks?

- Focus on your project objectives to assess risks to these being achieved
- Risk management process will keep a check throughout project – in its simplest form it is **identifying** risks, **assessing** them, **planning** and **implementing** response
- Defer
- Avoid
- Accept
- Transfer
- Reduce

Sample risk log

ID	Risk	Originator	Date	Owner	Probability	Impact	Risk score (H/M/L)	Mitigation/ contingency	Others?

- Always plan ahead
- Analyse both the source and consequence of the risk
- Plan how to reduce the risk
- Devise alternative options as contingency
- Be prepared to seek advice – get a wider view
- Consider the controllable and uncontrollable parts of the risk
- Be aware of links to organisational risk

What if a risk becomes an issue?

An **issue** – something that has happened or definitely will happen.
Need to identify and address it- may be a previous risk, or a new thing

- Issue identified
- Issue evaluated to understand impact
  - Potential resolutions identified
- Issue escalated to sponsor
  - Who may escalate to steering group
- Issue owner assigned
- Issue monitored by project manager
- Issue resolved and closed
- Capture in risk/issue log for learning



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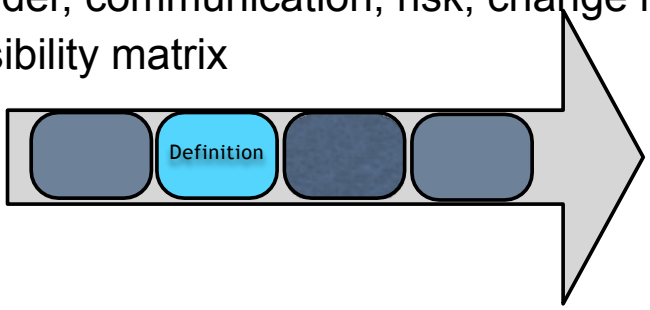
Producing a Project Management Plan

What is it?

- Brings together all the information for the project

What's in it?

- Business case information (updated)
- Scope of the project – what will be delivered
- Interfaces with other areas and dependencies
- Programme/schedule/costings
- Stakeholder, communication, risk, change management plans
- Responsibility matrix



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Time management and schedules

After defining the end products needed, the work and resources needed to produce them –

Now need to pinpoint what should happen when – logical sequence

- Start dates
- End dates
- Milestones
- Interdependencies

This helps you to think through the project and

- Make predictions on how long things will take
- Estimate rates of spending
- Plan for resource demands (both people and materials – and identify any problems or constraints)

This builds on the work done earlier and will contribute to the **schedule.**

Techniques to assign and manage resources

- Add people and costs to task breakdown for a comprehensive overview
- Responsibility Matrix (RACI) can help allocate work and be aware of overload/lack of resources
- Critical Path can help you to estimate timings and ensure efficiency of resources
- Schedules can be shown on:
  - -Bar charts/Gantt charts
  - -Diagrams (such as critical path)
  - -Project planning tools (Microsoft Project, Trello, Teams, Monday.com)

Responsibility matrix

RACI Example – Internal QA team

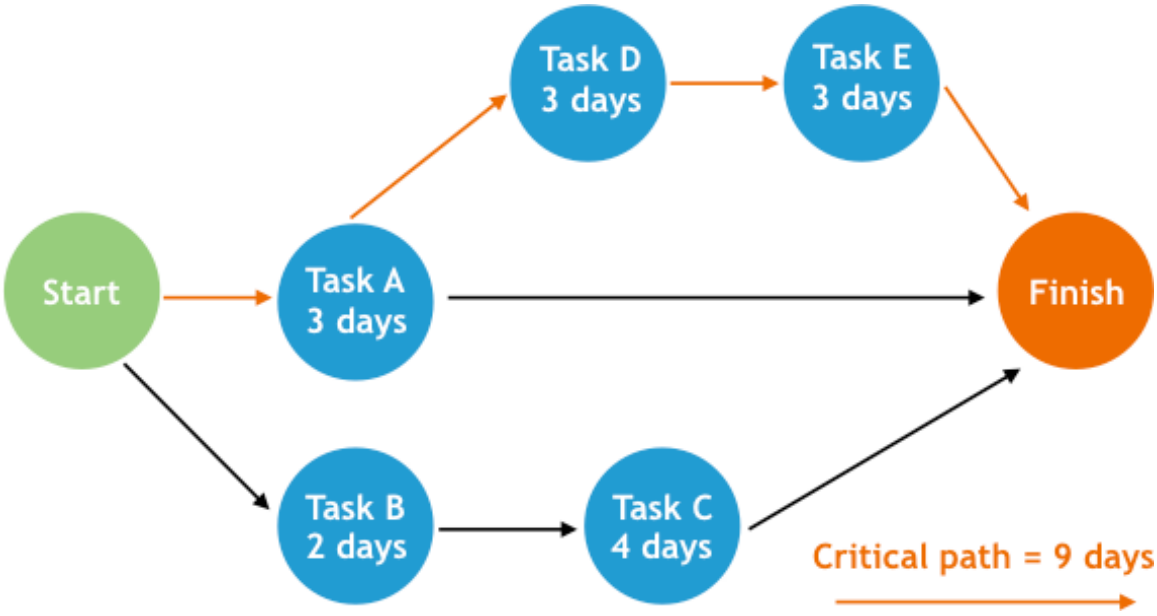
#	Task	QA TL – Lisa Choi	Mark Jacobs	Sharon Tiwari	Manfred Waxer	John Cooke	Vitaly Shevko	Due Date	Status
1	Receive functional scripts from the testing team	I	A	R			C	04-Aug-17	Done
2	Plan the testing process	A	C, I	C, I	R	C, I	C, I	06-Aug-17	Done
3	Set the pass test parameters	A	I	C	I	R	I	14-Aug-17	In Process
4	Run the scripts for the FDS's	I	R	A		C		15-Aug-17	Cancelled
5	Run the scripts for the CSD's	I			A	R	C	15-Aug-17	In Process
6	Collect the data and prepare the report	A	R	C	C	C	C	28-Aug-17	In Process
7	Analyze the pass rate and prepare the re-work	I	A	C	C	R	C	30-Aug-17	In Process
8	Present the failed scripts to the testing team	A	R	I	I	I	I	31-Aug-17	In Process
9	Re-test the failed scripts	I	C	I	A	I	R	05-Sep-17	In Process
10	Plan the team get together	I	I	C	R	A	I	07-Sep-17	Cancelled

Key

R - Responsible
A - Accountable
C - Consult
I - Inform

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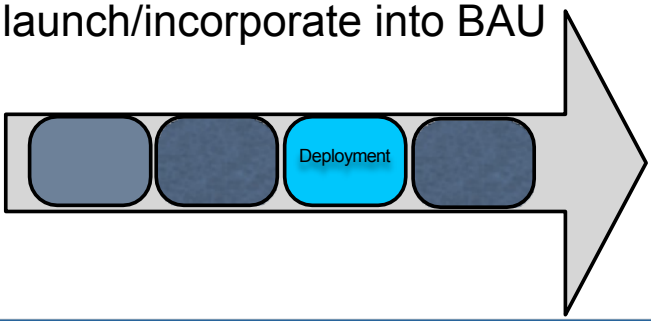
Critical path example



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Deployment (delivery)

- Implementing plans to deliver project
- Start up meeting, progress meetings
- Project monitored against the project management plan and adjusting resource to ensure you deliver
- Communications - ensure they happen/appropriate
- Checking risks - could turn into issues
- Controlling changes that people ask for
- Decide whether to launch/incorporate into BAU



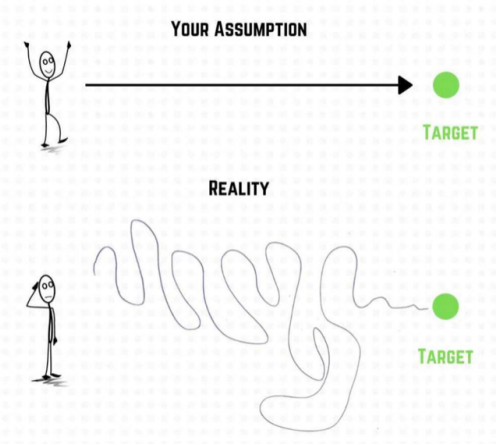
Highlight reporting/status updates

- Project name/sponsor/manager
- Recent activity/progress to date/milestones reached
- Horizon – next project activities and upcoming milestones
- Update on risks/issues/blocks (existing or new)
- Budget status
- Recommendations



Managing changes

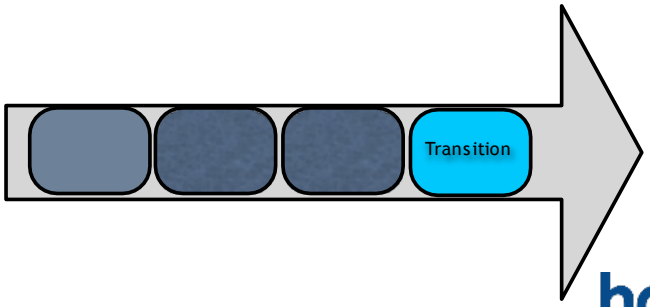
- Project Management Plan provides baseline on project scope
- Changes are often required as project progresses
- Capture all requests to change scope
- Consider knock on impact on other areas and legal issues
- Communicate and log decisions



Sample change request form
Project
Item affected
Change requested by
Description of change
Reason for change
Item/area affected by change (and impact on stakeholders)
Estimate of cost/savings
Estimated impact on schedule
Risk associated with the proposed change
Remarks/recommendation
Change approved/rejected (and any conditions/caveats) Signed Date Signed

Transition – handover and closure

- Testing things to be delivered
- Exit strategy
- Reviews
- Central place for documentation and learning
- Highlight best practice
- Changes to approach
- Benefits tracked and realised



Reviewing the Project - Evaluation

- Critical evaluation - Allows project team to reflect on project
- Decide what you are evaluating
  - goal based
  - process based
  - outcome based

To assist this process gather lessons throughout perhaps review at each "gate"

Reviewing the project

- Consider:
  - what's the purpose of this evaluation?
  - who needs to be involved?
  - which of the intended outcomes will you observe and measure?
- Questions to ask:
  - What did we do well?
  - What could we improve?
  - Did we deliver?
  - Lessons learned
  - Changes to approach (and how they will be disseminated and implemented)

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Action planning

- What could you do differently in the workplace as a result of this course?
- Is there one thing you can implement straight away?

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Further information

For further information or queries on today's session:
ruth@causewayconsulting.uk.com

General resources on project management:
www.apm.org.uk

Other project management sessions we deliver:

Making your Strategy A Reality

People Skills for Project Management

Leading Projects Strategically (2 day course)

We are happy to discuss content or how these could be adapted for your organisation