

This book provides an overview of project management techniques and tools that will assist the reader in defining projects, successfully managing projects and using appropriate and effective tools and techniques in the process of completing projects.

Project Management

Prepared by: Lisa Thompson-Smeddle

Table of Contents

Unit 1	Contribute to the identification and co-ordination of stakeholders, their roles, needs and expectations	2
1	<i>Identifying project stakeholders and recording their roles for the achievement of project outcomes.....</i>	3
2	<i>Identifying and documenting project stakeholders' needs and expectations according to an agreed format.....</i>	4
3	<i>Verifying project deliverables against the needs of stakeholders.....</i>	5
4	<i>How to document approved modifications to stakeholder needs and communicate them to relevant parties.....</i>	6
Unit 2	Contribute to the identification, description and analysis of the project needs, expectations, constraints, assumptions, exclusions, inclusions and deliverables.....	9
1	<i>Why you need to agree on objectives with all relevant parties.....</i>	9
2	<i>How to identify and record assumptions, needs, expectations, constraints, exclusions, inclusions and deliverables.....</i>	11
3	<i>Develop and further elaborate work packages to present an overall view of the project scope .</i>	13
4	<i>How to document a work breakdown structure within agreed time frames.....</i>	15
Unit 3	Contribute to preparing and producing inputs to be used for further planning activities.	19
1	<i>How to compile a scope document.....</i>	19
2	<i>Producing a scope document to include a rudimentary sequence of events and/or milestones .</i>	23
3	<i>Communicating the scope document to stakeholders.....</i>	24
4	<i>The measures you need to monitor to ensure project success.....</i>	25
Unit 4	Contribute to the monitoring of the achievement of the project's scope.....	27
1	<i>Why you should communicate feedback of progress towards delivering the scope of a project.</i>	27
2	<i>Identifying deviations from scope and communicating opportunities for corrective action or improvement to relevant individuals/teams</i>	29
3	<i>Signing off the project - verifying project deliverables as complete as per agreed scope definition or specified requirements.....</i>	31
Unit 1	How to ensure that output of project management tools and techniques meet individual, team and organisational needs or requirements	33
Unit 2	Apply corrective action steps where project management tools and techniques usage problems occur	35
1	<i>What are the potential problems with the usage of project management tools and techniques against project requirements?.....</i>	36
2	<i>Possible solutions to project management problems.....</i>	38
3	<i>When and how to consult with higher authority.....</i>	40

Introduction

This book provides an overview of project management techniques and tools that will assist the reader in defining projects, successfully managing projects and using appropriate and effective tools and techniques in the process of completing projects.

A project must have:

- Defined activities to be completed.
- Clear objectives in terms of quality, time and cost.
- People and other resources capable of completing the necessary tasks.
- A project manager.

In order to effectively manage any project, you need appropriate tools, such as:

- A clear project specification.
- Visual representation of project structure such as a Gantt chart.
- Processes or techniques for monitoring progress.
- Final debriefing.

Chapter 1 **Contribute to project initiation, scope definition and scope change control**

In this chapter, we will look at who benefits from a project, how we can best define a project's objectives, called the scope of a project, the factors that can impact on a project plan and how to monitor the outcome of a project.

Multi-skilled teams are often required to carry out project activities successfully, and without a variety of skills sets, projects can remain singularly focused and may not achieve the goals originally set out. The people responsible for ensuring that projects are managed properly need to become experts in project management skills. This book is meant to provide assistance for readers who would like to become expert project managers.

Unit 1 Contribute to the identification and co-ordination of stakeholders, their roles, needs and expectations

The first step to take with any project is to identify:

- The people involved in implementing the project.
- The people needed to provide internal and external resources for the project.
- The people who will benefit from the project.

1 Identifying project stakeholders and recording their roles for the achievement of project outcomes

Depending on the complexity of a project, stakeholders can be any or all of the following:

- Various professionals and experts (researchers, medical practitioners, therapists, social workers, etc...)
- Team members
- Managers
- Recipients/Beneficiaries
- Government
- Communities
- Consumers

In this book, we will use a case study called “The new employee project” to illustrate our points.

Example

A local NGO is hiring a new employee. The direct stakeholders in our 'New Employee Project' are likely to be the following:

- Individual(s) who will manage the project.
- Individual who defines the job content and employment contract factors, such as rate of pay and working hours.
- Individual(s) responsible for creating, checking and placing the advertisement for the job.
- Individual(s) responsible for receiving and vetting applications.
- Individual(s) responsible for the interview arrangements.
- Individual(s) responsible for making the final decision.
- Newspaper companies in which adverts are placed.
- Prospective candidates who apply for the job.
- Individual or team responsible for introducing the new employee to the job and the department.

In the above example, we have deliberately chosen to allocate all the tasks related to the project to different individuals. In smaller companies or NGOs, most of the tasks would be done by one or two individuals.

Activity 1

Work with other group members.

Complete this activity before turning to the next page.

Discuss a project you are currently working on and list all the stakeholders you can think of that could be involved in the project process.

2 Identifying and documenting project stakeholders' needs and expectations according to an agreed format

As you probably realise, projects require a range of activities from straightforward activities, such as recruiting a new employee, to very complex activities such as establishing mobile clinics in 6 countries. A benefit of listing stakeholders as we did in the previous section is that we begin to document not only the people involved but also the tasks and responsibilities of each stakeholder. In turn, each stakeholder has particular needs and expectations that should also be identified.

Example

For our new employee project, the needs and expectations of the stakeholders can be displayed in a table as follows:

Stakeholder:	Needs and expectations:
Manager	Achieve best outcome (best person to do job) for open position. Achieve project at earliest time and at minimal cost. Ensure that department staff work efficiently.
Responsible employee	Clearly defined project. In-house information clear and correct. Sufficient authority and budget to complete tasks to final interview stage.
Team	Opportunity to contribute to decisions regarding new job content and type of person needed. Opportunity to bring new employee into team.
Newspaper(s)	Receive accurate details of the advertisement by the required time for publication. Receive specific instructions regarding advertising times.

	Receive payment for advertising.
Applicant	To be treated with respect and fairness. Consideration regarding time of travelling for interviews. Transparency regarding job specification. Fair and equitable wages and working conditions.

When needs and expectations are defined for the individual stakeholders, it becomes easier to determine the tasks that will have to be delivered, sometimes called the deliverables, to complete the project successfully.

3 Verifying project deliverables against the needs of stakeholders

While a project has a specific objective, or expected outcome, it is usually broken down into tasks that are the responsibility of one or more stakeholders.

Example

The deliverables for each of the stakeholders can be aligned to needs and expectations as follows:

Stakeholder:	Needs and expectations:	Deliverables:
Manager	Achieve best outcome (best person to do job) for open position. Achieve project at earliest time and at minimal cost. Ensure that department staff work efficiently.	Clearly define project specification. Clearly define time and cost. Set up schedule for reporting and feedback. Supervise project operation.
Responsible employee	Clearly defined project. In-house information clear and correct. Sufficient authority and budget to complete tasks to final interview stage.	Produce accurate job description. Agree job description with team and manager. Identify suitable newspapers. Give clear instruction to newspaper regarding publication date(s). Receive applications and select good applicants for interview. Pass newspaper invoice for payment. Advise unsuccessful applicants. Arrange and implement interviews. Select shortlist. Liaise with manager regarding final interviews.

		<p>Implement final interviews, select and appoint candidate, and arrange date of starting.</p> <p>On start date, issues employment contract.</p> <p>Introduce new employee to team for induction.</p>
Team	<p>Opportunity to contribute to decisions regarding new job content and type of person needed.</p> <p>Opportunity to bring new employee into team.</p>	<p>Discuss and summarise job requirements.</p> <p>Check and agree proposed job specification.</p> <p>Welcome new employee to team and implement induction process.</p>
Newspaper(s)	<p>Receive accurate details of the advertisement by the required time for publication.</p> <p>Receive specific instructions regarding advertising times.</p> <p>Receive payment for advertising.</p>	<p>Ensure accuracy of advertisement.</p> <p>Receive and check instructions regarding publication date(s) and position.</p> <p>Ensure publication on the agreed date(s).</p> <p>Submit invoice for payment.</p>
Applicant	<p>To be treated with respect and fairness.</p> <p>Consideration regarding time of travelling for interviews.</p> <p>Transparency regarding job specification.</p> <p>Fair and equitable wages and working conditions.</p>	<p>Provide accurate information in job application to factors specified in the advertisement.</p> <p>Cooperate with business regarding interview arrangements.</p> <p>Ask questions to gain any information required personally.</p> <p>Advise interviewer of current notice periods and other relevant factors.</p> <p>Agree start date for new job.</p> <p>Turn up on the agreed date and time.</p>

Of course, it would probably be unusual for any project to run exactly according to its original schedule; it is more likely that changes become necessary as a project progresses.

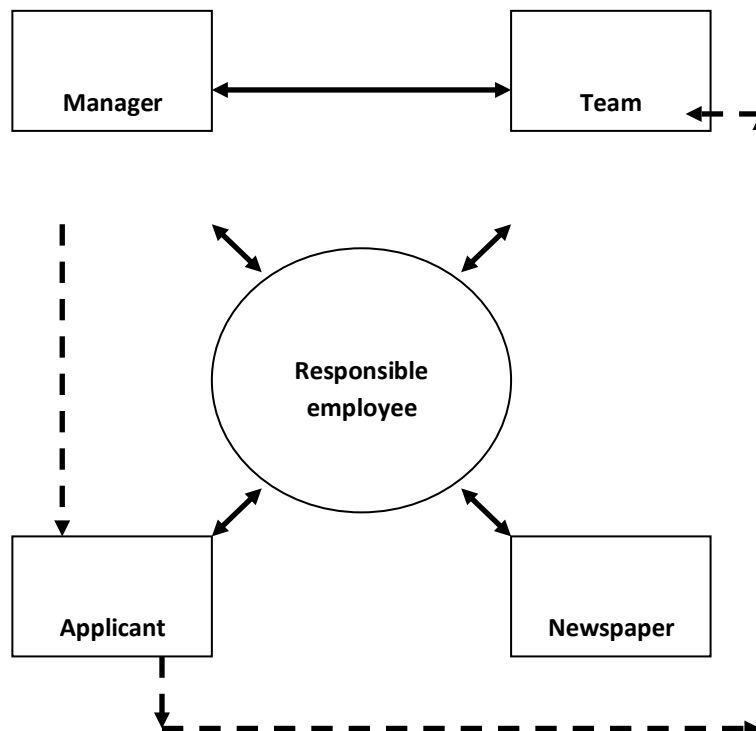
4 How to document approved modifications to stakeholder needs and communicate them to relevant parties

One of the greatest threats to successful project management is the failure of stakeholders to communicate with each other. It is extremely important for all stakeholders to remain in contact with each other during a project and to make sure that any change introduced by one stakeholder is communicated to all other stakeholders.

We can illustrate the communication links for our example project.

Example

For the new employee project, the administration tasks have been delegated to the responsible employee, so that communications flow to and from that employee to all other stakeholders. However, the manager, team and applicant also have indirect communication links with each other as well as with the responsible employee; these links are shown in the following diagram with dotted lines.



With a simple project such as this, the best way to ensure that all stakeholders are aware of changes would be to advise the responsible employee who could then pass information to relevant stakeholders. However, a larger project can have a number of groups working together to achieve the project, such as:

- Teams, including managers, responsible for certain specialist parts of the project.
- External contractors.
- A communications manager responsible for collecting and passing on information to relevant managers.

For all projects, it is advisable to include in the management process some form of documentary statement through which all changes are recorded and passed to relevant individuals.

Example

The manager agrees on the following schedule for the recruitment of the new employee:

- Advertisements to appear on 1 April.
- First interviews scheduled for 20 April.
- Final interviews scheduled for 30 April.

However, on 26 April, the manager is told that she is being considered for promotion and must attend a two-week training course for senior managers. She advises the responsible manager that she will carry out final interviews when she returns to work on 10 May. By that time, short-listed applicants have been chosen and the team advised to schedule for the new employee starting work on 24 May.

The responsible manager immediately implements the communications process to advise stakeholders of the changed arrangements, by circulating the following Project Change form:

Project change – New Employee Project			
<i>Change factor:</i>	<i>Original:</i>	<i>Revised:</i>	<i>Circulation (for action):</i>
Final interview for new employee	30 April	10 May	<u>Applicant</u> (rearrange date of appointment).
			HR Department (date contract of employment required).
			Team (rearrange induction for 24 May)
			Manager (confirm change implemented).

As you can see, this form is circulated to all stakeholders who need to know about, and need to act on, changes being implemented. This enables a project to progress as smoothly as possible to its achievable conclusion.

Advantages and Disadvantages of a Project Change form

The advantages and limitations of the Project Change form are as follows:

Project tool:	Advantages:	Limitations:
Project Change form	<p>Details change actions that require attention.</p> <p>Identifies individuals who are required to take correct actions.</p> <p>Provides written record for future reference.</p>	<p>Of little use unless it is delivered to action individuals immediately.</p> <p>Can get delayed in over-busy departments.</p>

Activity 2

Work with the same group members.

Take the project you discussed in your previous activity and identify the needs and expectations of each stakeholder. Identify the deliverables that each stakeholder will have to address for the project to be successful.

Unit 2 Contribute to the identification, description and analysis of the project needs, expectations, constraints, assumptions, exclusions, inclusions and deliverables.

1 Why you need to agree on objectives with all relevant parties

In the previous section, we identified the stakeholders that can be involved in a project and we talked about how project changes need to be communicated to those stakeholders. If we are to hold stakeholders responsible for the deliverables identified, we have to make sure that they know and understand the objectives that we expect each stakeholder to achieve.

You might say that we have done that by identifying each stakeholder's deliverables, but we have omitted when this objective must be achieved.

This raises the importance of defining objectives to meet a standard that we call 'SMART objectives'.

SMART objectives

SMART objectives are so called because of the factors identified by the letters of the word:

- **S** for specific, meaning that an objective must be defined specifically and not combined with other objectives.
- **M** for measurable, meaning that we have to be able to measure it mathematically.
- **A** for achievable, meaning that the stakeholder must be able to achieve the objective you set. A person will not attempt an unachievable objective.
- **R** for realistic, meaning that the objective must be realistic in terms of the resources available to the stakeholder.
- **T** for time-related, meaning that an objective should be achieved by or within a specified date or time.

When you hold stakeholders to very specific deliverable factors, you have to involve those stakeholders in the original design of the objectives and you must get their agreement that they will meet the objectives set. Failing to do so can result in a stakeholder saying, "I did not agree this objective so you cannot hold me to it."

Therefore, the rules regarding objectives are:

- Involve stakeholders in the original design of objectives.
- Always use the SMART code for designing objectives.
- Get stakeholders to agree to final objectives for which they will be responsible.

Activity 3

Work on your own.

Look back at Activity 2 and identify any deliverables that do not meet the SMART criteria. Highlight or underline the deliverables that need to be addressed.

At the side of each one put the letter (S M A R T) to represent the issues you need to think about.

2 How to identify and record assumptions, needs, expectations, constraints, exclusions, inclusions and deliverables

Even when we state objectives according to the SMART code, we are still dependent on a number of other variables, such as:

- *Assumptions* that resources and stakeholders will be available for the project.
- *Exclusions*, which can be items that are not currently available or items we have but do not need.
- *Inclusions*, which are factors that we have included in the objectives that we need to address.
- *Deliverables* previously defined.
- *Constraints* on the ability of current resources to produce a successful outcome.

Let us consider each of these factors in a little more detail.

Assumptions

We all make assumptions. For example, we assume that people will generally turn up for work; that we will have enough materials to do our jobs; that our wages will be paid at the end of the week or month.

In a project situation, it would be very easy to assume that project stakeholders will be available and that they will have the time and resources that we assume to be part of their jobs. You might already be feeling that, if you want to deliver a successful project, you cannot make any assumptions.

In reality, there are two ways to deal with factors that you want to assume, which are:

- State your assumptions. Write down, in detail, the factors you have 'assumed' to be available to complete a project successfully.
- Check, as far as is possible, that the factors are and will be available to contribute to the project.

When you check on your assumptions, you often find that there can be resources that are not available.

Exclusions

When you look at the things you need, you might find that there are resources that are not available when the project needs them. You therefore list:

- Factors that are not available but are needed for the successful completion of the project.
- Factors that are not available but can be excluded because they are not necessary or they can be replaced with an available alternative, in order to successfully complete the project.

For example, it would be possible to exclude the contract of employment on the first induction day of our new employee project, provided that we knew it would be available within the first two-or-three days.

Inclusions

Inclusions are, of course, the factors that you identify that you need and know are available to allocate to the project. Inclusions are usually factors that are under your control and which you have the authority to direct to the project.

For example, the manager of our new employee project would know that she could expect the identified responsible employee to carry out the major tasks, and could make sure that she allowed enough time for them to be completed properly.

Deliverables

Since deliverables form the basis for defining objectives, it makes sense to take them into account at every stage of project development.

Constraints

When you start to identify the factors listed above, you are likely to come across constraints that can prevent your project from being achieved. For example, a constraint to our new employee project might be the Finance Manager saying, "Sorry, you cannot have another employee because you do not have the money in your budget to pay another salary."

Constraints can be impossible to overcome, in which case it would be unwise to attempt the project, or they can be perceived as a challenge to be addressed. For example, the business faced with a rejection by the Finance Manager might be able to say, "We have a budget for temporary workers, whose tasks will be incorporated into the new employee's job. Therefore we can afford the new employee".

The important aspect of this part of project development is that you identify and record all the factor that are likely to impact on a project. A good way of doing this is to create a *table of variables*, similar to the one we designed earlier, so that you have all the information readily available and you can make sure that nothing is missed.

Example

Start with each of the SMART objectives that you have initiated for the project. In the following tables we have taken the objective, "Define project specification and costs by 15 March."

Table of variables for the New Employee Project		
Objective:	Inclusions:	Constraints and exclusions:
Define project specification and costs by 15 March.	Briefing with team and responsible employee. Feedback from team. Preparation time for creating specification. Agree costs with Finance Department.	Budget constraint. Check newspaper lead times for adverts.

Activity 4

Work with other group members.

Take any two deliverables you have listed in the previous activity.

Identify the inclusions required to deliver the objectives.

Identify possible constraints and exclusions related to the objectives.

Produce a table of variables for your objectives.

3 Develop and further elaborate work packages to present an overall view of the project scope

Project objectives also enable you to develop a very important aspect of project management – the creation of a *project task list* for the whole project. A task list enables you to define all the tasks that need to be completed to ensure that the project is completed successfully; it also enables you to determine the order in which tasks have to be carried out.

How to create a project task list

An effective task list usually contains the following information:

- A reference number for each task, to avoid having to constantly write out the full details of the task in future.
- Full description of the task.
- Person responsible for completing the task.
- Start date for the task in order to ensure the smooth flow of the project.
- Required completion date of the task in order to ensure the smooth flow and successful completion of the project.

SOMETHING TO KNOW: IN PROJECT MANAGEMENT, SOME TASKS HAVE TO BE STARTED AND PERHAPS COMPLETED BEFORE OTHER TASKS CAN START. THIS IS WHY WE HAVE TO DEFINE START AND COMPLETION DATES OR TIMES FOR EVERY TASK.

Example

For our new employee project, the task list could appear as follows ('Mgr' means Manager and 'RE' indicates the responsible employee):

Task List for New Employee Project				
Ref:	Task description:	Person:	Start date:	Complete date:
NEP1	Discuss and summarise job requirements.	Team RE	12 March	13 March
NEP2	Clearly define project specification.	Mgr	14 March	15 March
NEP3	Check and agree proposed job specification.	Team	16 March	16 March
NEP4	Clearly define time and cost.	Mgr	by	16 March
NEP5	Set up schedule for reporting and feedback.	Mgr RE	by	16 March
NEP6	Supervise project operation.	Mgr	15 March	24 May
NEP7	Produce accurate job description.	RE	by	16 March
NEP8	Agree job description with team and manager.	RE	by	16 March
NEP9	Identify suitable newspapers.	RE	by	16 March
NEP10	Give clear instruction to newspaper regarding publication date(s).	RE	by	18 March
NEP11	Newspaper adverts appear		1 April	
NEP12	Receive applications and select good applicants for interview.	RE	2 April	10 April
NEP13	Pass newspaper invoice for payment.	RE	by	7 April
NEP14	Advise unsuccessful applicants.	RE	by	11 April
NEP15	Arrange and implement	RE	11 April	20 April

	interviews.			
NEP16	Select shortlist.	RE	20 April	21 April
NEP17	Liaise with manager regarding final interviews.	RE		21 April
NEP18	Arrange final interviews.	RE	22 April	25 April
NEP19	Final interviews, select and appoint candidate, and arrange date of starting.	Mgr RE		10 May
NEP20	On start date, issue employment contract.	RE		24 May
NEP21	Introduce new employee to team for induction.	RE		24 May
NEP22	Welcome new employee to team and implement induction process.	Team		24 May

In this table, we have used the internal deliverables identified earlier as the main tasks of the project; we have supplemented them with any additional tasks required to deliver the project successfully.

The company now has a complete task list that shows the scope of the project. The scope of a project, as displayed in a task list, identifies all that has to be done and the rough order in which activities should take place. However, it is not a clear picture showing where activities overlap. In other words, it does not show the *structure* of the project.

Important words and ideas: Scope means the extent or range of the project, covering all necessary activities from beginning to end.

4 How to document a work breakdown structure within agreed time frames

There are a number of ways in which to demonstrate the structure of a project, particularly when a project is very complex and runs for several months. In this case a project structure can appear on a chart several meters long.

For a straightforward project such as our new employee project, the structure and timing of tasks can be clearly demonstrated using a special table, or chart, called a Gantt chart.

What is a Gantt chart?

A Gantt chart is a chart that displays activities over a period of time. We can best describe a Gantt chart by providing an example for the new employee project example that we have been using, as displayed below.

<i>Ref:</i>	<i>Task description:</i>	<i>Person:</i>	<i>Mch</i> 12		Mch 12	19	26	Apr 2	9	16	23	30	May 7	14	21	24
NEP1	Summarize job requirements.	Team/RE	12 March	13 March	✓											
NEP2	Project specification.	Mgr	14 March	15 March												
NEP3	Job specification.	Team	16 March	16 March												
NEP4	Clearly define time and cost.	Mgr	by	16 March												
NEP5	Schedule for reporting.	Mgr/RE	by	16 March												
NEP6	Supervise project operation.	Mgr	15 March	24 May												
NEP7	Job description.	RE	by	16 March												
NEP8	Agree job description.	RE	by	16 March												
NEP9	Identify newspapers.	RE	by	16 March	✓											
NEP10	Instruct newspaper.	RE	by	18 March												
NEP11	Newspaper adverts appear		1 April													
NEP12	Review applications.	RE	2 April	10 April												
NEP13	Pass newspaper invoice.	RE	by	7 April												
NEP14	Unsuccessful applicants.	RE	by	11 April												
NEP15	Arrange interviews.	RE	11 April	20 April												
NEP16	Select shortlist.	RE	20 April	21 April												
NEP17	Liaise with manager.	RE		21 April												
NEP18	Arrange final interviews.	RE	22 April	25 April												
NEP19	Select and appoint.	Mgr/RE		10 May												
NEP20	Issue employment contract.	RE		24 May												
NEP21	Introduce new employee.	RE		24 May												
NEP22	Welcome new employee.	Team		24 May												

Example

Notice how the manager's tasks are bordered so that she can see instantly which tasks she should complete by the end of each week. By running her finger across the top date row she can also identify what the project should have achieved by a certain date. With a Gantt chart, it is possible for any individual involved to mark his or her tasks and to use the chart as a planning device to ensure that he or she completes tasks when required to allow the project to flow forward.

SOMETHING TO KNOW: IT IS POSSIBLE TO DESIGN A GANTT CHART SHOWING THE TIME PERIODS AS DAYS; IN THE ABOVE EXAMPLE WE HAVE USED WEEKS BECAUSE OF THE SPACE RESTRICTION ACROSS THE PAGE.

There are other devices you can use with a Gantt chart, which include the following:

- Identify different individual's activities on the chart using different colours.
- Use lines across the chart to show the *exact* start and finish dates of each activity.
- Use different types of line, such as plain, dashed, double, to identify responsible individuals.
- Use individual's initials in the date squares where action is required.

Advantages and Limitations of a Gantt chart

The advantages and limitations of a Gantt chart are as follows:

Project tool:	Advantages:	Limitations:
Gantt chart	Provides a quick overview of the project. Simple to create by hand or using a computer programme such as a spread sheet. Can be produced from project management software.	Not clear where overlaps between tasks occur. No link between tasks that need to be addressed together.

Unit 3 Contribute to preparing and producing inputs to be used for further planning activities

Even the simplest of projects tends to require a number of different actions and can use a variety of resources. In some cases, a project can require the services of external contractors who also have to be managed to deliver to the dates required. The example we have given has been simplified for the purposes of this book, but in a real project there would be far more than 21 internal tasks to complete.

All projects aim to embrace three entrenched laws – aiming to complete a project:

- To an agreed level of quality.
- On time, according to a laid down schedule.
- Within the cost allocated.

SOMETHING TO KNOW: A VERY GOOD SAYING TO REMEMBER WHEN YOU START A PROJECT IS, "IF YOU FAIL TO PLAN YOU ARE PLANNING TO FAIL".

Therefore, always start all your projects with a scope document.

1 How to compile a scope document

A scope document should contain an accurate description of the project, its objectives and the variables that we identified above. Therefore, it should contain the following sections:

- Project profile that accurately describes the project and states why the project is required.
- Project objectives, defined according to the SMART system.
- Cost and benefits of the project.
- Resources required for the project.
- Constraints, in terms of resources, finance and time.
- Post-project requirements, including training requirements for new equipment and systems.
- Risks associated with the project.

We have covered most of these issues in the previous sections and can best reinforce the information you have by giving an example of a scope document.

Example

The scope document for the new employee project could look like the following:

Project profile

This project has originated from the need for a new employee. For the past few months, the department has been unable to cope with the additional work resulting from the increase in overall business. We have endeavoured to use temporary labour to cover the additional work but find it to be inefficient and we are concerned that an error could lead to a severe loss to the business. Therefore, we propose that we employ an experienced permanent member of staff who can be quickly trained in our processes and can bring benefits to the business.

Project objectives

Our objectives are:

- To clearly identify and record, by 9 March, the departmental needs to be met by the new employee.
- To advertise the job and hold initial interviews of suitable employees by 10 April.
- To shortlist, re-interview and appoint the most qualified and experienced applicant by 10 May.
- To achieve a fully trained employee capable of addressing the department's needs by the end of May.

Cost and benefits of the project

Project costs and benefits are shown in the following table:

Cost-Benefit Analysis for new employee project		
Item:	Cost (R):	Benefit (R):
Cost of advertising job	800	
Staff cost of implementing recruitment process	2 000	
Telephone calls, postages etc.	180	

Stationery	190	
Applicants' travelling expenses paid by the business	700	
Induction and process training	1 500	
Total one-off costs	5 370	
Salary and employee levies per annum	36 000	
Saving in temporary labour costs		28 000
Saving in overtime payments to existing staff		6 000
Saving in fees payable to labour brokers		7 000
Annual costs and savings	36 000	41 000

This table shows that the project will almost pay for itself in Year 1 and will be financially beneficial to the business after that.

Resources required for the project

The costs listed in the cost-benefit analysis shown above identify the resources required to complete this project, which are:

- A budget of R5 370 to meet the costs shown. Employee costs relate to overtime payments to cover the stated tasks.
- A small amount of management time supervising the project.
- Time required by one responsible employee to implement the relevant project processes.

Constraints, in terms of resources, finance and time

Existing staff have agreed to devote the time necessary for this project and, provided we are allocated the stated budget, there should be no constraints on our being able to deliver this project to the time schedule specified in our objectives.

Post-project requirements, including training requirements for new equipment and systems

We aim to attract an experienced and qualified individual for this job. Training would be required in the specific processes used by the

business. We estimate that this should not take more than two days; we have included the cost of training in the cost-benefit analysis shown above.

Risks associated with the project

The risks associated with this project are:

- Failure to agree the required job specification within the time schedule.
- Failure to get newspaper advertising at the required time
- Failure to attract a suitable individual for the position offered.
- Possibility of errors in business processes, and associated costs, if we are not able to attract the right person.

We have already discussed and agreed broad outlines within the department to minimise the possibility of internal failures. The objectives stated provide the relevant lead time for newspaper advertising. Therefore, the main risk is our inability to attract a suitable applicant and the possibility of process error from temporary employees. We believe that the salary offered should attract the type of applicant required.

SOMETHING TO KNOW: A COST-BENEFIT ANALYSIS IS A TOOL USED BY MANAGEMENT FOR A VARIETY OF INITIATIVES. ITS INTENTION IS TO IDENTIFY CURRENT AND FUTURE BENEFITS ARISING FROM CURRENT EXPENDITURE. IN OTHER WORDS, AN EXPENDITURE DECISION MAY NOT ONLY DEPEND ON IMMEDIATE INCOME BENEFITS BUT CAN ALSO TAKE INTO ACCOUNT BENEFITS RECEIVED IN THE FUTURE.

Another common term for a scope document is a “Terms of Reference,” which can be written up each employee or contractor. A Terms of Reference spells out what you expect of the employee/contractor, over what period of time and at what cost. This forms part of the contractual arrangement between you and the employee/contractor, and eliminates risk for your company. A scope document or Terms of Reference can also contain a Gantt chart showing the structure and timing of the project.

2 Producing a scope document to include a rudimentary sequence of events and/or milestones

When you include a Gantt chart in the scope document, it is a good idea to specifically include milestones that identify key points at which the project could go wrong. These are key monitoring points.

Example

Taking a section of the Gantt chart we produced for our new employee project, we can identify specific import mileposts as follows:

Ref:	Task description:	Person:	Mch 12		Mch 12	19	26	Apr 2
NEP1	Summarise job requirements.	Team/RE	12 March	13 March				
NEP2	Project specification.	Mgr	14 March	15 March				
NEP3	Job specification.	Team	16 March	16 March		M1		
NEP4	Clearly define time and cost.	Mgr	by	16 March				
NEP5	Schedule for reporting.	Mgr/RE	by	16 March				
EP6	Supervise project operation.	Mgr	15 March	24 May				
NEP7	Job description.	RE	by	16 March				
NEP8	Agree job description.	RE	by	16 March		M2		
NEP9	Identify newspapers.	RE	by	16 March				
NEP10	Instruct newspaper.	RE	by	18 March				
NEP11	Newspaper adverts appear		1 April					M3
NEP12	Review applications.	RE	2 April	10 April				
NEP13	Pass newspaper invoice.	RE	by	7 April				
NEP14	Unsuccessful applicants.	RE	by	11 April				
NEP15	Arrange interviews.	RE	11 April	20 April				
NEP16	Select shortlist.	RE	20 April	21 April				
NEP17	Liaise with manager.	RE		21 April				
NEP18	Arrange final interviews.	RE	22 April	25 April				
NEP19	Select and appoint.	Mgr/RE		10 May				
NEP20	Issue employment contract.	RE		24 May				
NEP21	Introduce new employee.	RE		24 May				
NEP22	Welcome new employee.	Team		24 May				

Mileposts shown above, crucial to the progress of the project, are:

- M1 = Presentation of job specification
- M2 = Finalisation of job description
- M3 = Advert appears on the required date

Once a scope document has been prepared, it is important that it is circulated and communicated to those employees who will have responsibilities for delivering the project.

Advantages and Disadvantages of Using Mileposts

The advantages and limitations of using mileposts are as follows:

Project tool:	Advantages:	Limitations:
Mileposts	Give a fast indication when project monitoring is necessary. Easy to install in a Gantt chart.	Project manager must remember to change the mileposts if any other project factor changes. Mileposts can mislead a manager into only monitoring at those times, instead of continually monitoring a project. Must be accurate and relevant to avoid wasting monitoring time.

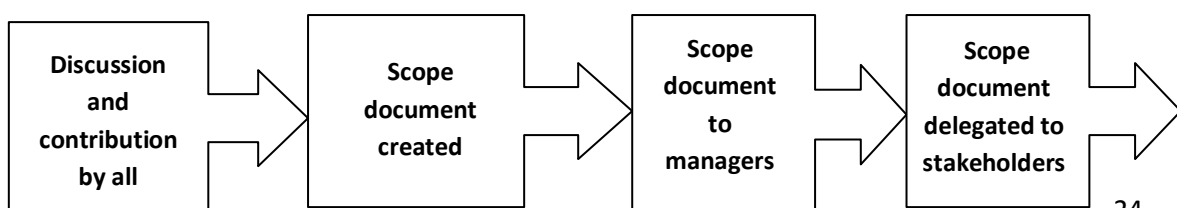
3 Communicating the scope document to stakeholders

The scope document needs to be approved by all relevant stakeholders to ensure that they 'own the document and own the responsibilities'. In other words, if those responsible for implementing the project processes agree the scope document they cannot afterwards say that the tasks are not achievable.

This means that the communication process should undergo two stages:

- A consultation stage when issues for inclusion in the scope document are discussed and agreed.
- An implementation stage when the agreed scope document is issued for action.

The communication process can be illustrated by the following diagram:



As we have said before, failing to involve and communicate with stakeholders can lead to the failure of a project.

Advantages and Limitations of a Scope document

The advantages and limitations of a scope document are as follows:

Project tool:	Advantages:	Limitations:
Scope document	<p>Provides a detailed specification of the project.</p> <p>Identifies constraints.</p> <p>Specifies quality, time and cost of delivery.</p> <p>Provides visual chart of project structure.</p> <p>Specifies responsibilities.</p> <p>Specifies company procedures.</p>	<p>Can be produced before factors such as necessary resources have been checked.</p> <p>May not address constraints.</p> <p>Can be too optimistic in relation to project delivery.</p> <p>Sometimes written by an individual without experience who will not be involved in the project.</p> <p>May not involve, or get the support of, those who will have to deliver the project.</p>

4 The measures you need to monitor to ensure project success

A project can fail for a number of reasons, which include the following:

- Unclear objectives that have not been designed to SMART (or similar) criteria. People can only deliver the required level of performance when they know exactly what is expected from them.
- Changing objectives that cause confusion among those delivering the project and lead to vital factors being missed. A well researched and detailed scope document should minimise the possibility of changes in a small project. When a change becomes necessary, a written change document should be issued to everyone involved in the project.
- Poor estimates in the scope report, which create the risk of being unable to meet the 'laws of project management' – delivering to quality, on time and within budget.

- Lack of control points, or mileposts, that result in management paying insufficient attention to managing the progress of the project over time. Poor management allows delays and errors.
- Poor communications, resulting in important information not getting to the people responsible for project tasks.
- Inadequate planning to ensure that the availability of important resources is checked and constraints are identified, to avoid a breakdown of the project processes.
- Unclear roles and responsibilities, which often mean that some tasks are addressed by more than one person while other tasks are ignored, leading to project failure.
- Loss of direction from management so that those involved in the project do not take their tasks sufficiently seriously, leading to errors and omissions.
- False optimism, which arises when project managers believe that "it will all come right in the end" and fail to take the necessary steps early enough to ensure project delivery.
- Lack of appropriate skills shows when tasks are delegated to inexperienced individuals and tasks are missed or not done well, preventing the follow-on tasks from being done correctly.

Accordingly, it is extremely important to:

- Appoint an overall project leader responsible for managing, controlling and monitoring the project.
- Apply plenty of mileposts for specific key actions to ensure there are constant checks that the project is progressing according to plan.
- Require the project leader to report regularly on the achievement of mileposts and on any factor that is preventing the project from being delivered successfully.
- Debrief the project to identify *learning points*.

Important words and ideas: Learning points are experiences that allow you to learn from an error or omission so that you can avoid repeating the mistake in the future.

Unit 4 Contribute to the monitoring of the achievement of the project's scope

At the end of the previous Unit, we explained why it was important to hold a debriefing meeting to assess the success of a project process and system and to identify how it could have been managed more effectively. However, this is not the end of the project management responsibility. If you are going to learn from the mistakes of a project, and avoid the same mistakes in the future, you have to communicate lessons to all relevant individuals in the department and perhaps in the organization. This is your contribution to improving project management in your organisation.

1 Why you should communicate feedback of progress towards delivering the scope of a project

As a project progresses, you have two major responsibilities as the person in charge of delivering project objectives:

- Continually monitoring progress and keeping the project as close to plan as possible.
- Giving feedback and motivation to everyone involved in the project.

SOMETHING TO KNOW: THIS BOOK DOES NOT COVER THE IMPORTANT SUBJECT OF GIVING FEEDBACK AND MOTIVATING YOUR TEAM, BUT YOU SHOULD KNOW THAT MOTIVATION IS *NOT* ABOUT SHOUTING AND PLACING BLAME FOR MISTAKES - MOST MISTAKES OCCUR AT THE PLANNING STAGE. MOTIVATION IS ABOUT IDENTIFYING EVERYTHING GOOD IN A PERSON'S PERFORMANCE AND ENCOURAGING EACH INDIVIDUAL TO WORK TO HIS OR HER HIGHEST LEVEL OF ACHIEVEMENT.

As you monitor the progress of a project, you should always identify the factors that have already been successfully completed. You can tick off those factors on your Gantt chart so that you have a record of progress to your last monitoring point, or perhaps print off a different monitoring table, such as the one given in the example below, that you use in conjunction with your Gantt chart:

Example

A Project Feedback Record for the new employee project could look like the following:

PROJECT FEEDBACK RECORD dated:					
Ref:	Task description:	Person:	Start:	Finish:	Feedback:
NEP1	Summarise job requirements.	Team/RE	12 Mch	13 Mch	
NEP2	Project specification.	Mgr	14 Mch	15 Mch	
NEP3	Job specification.	Team	16 Mch	16 Mch	
NEP4	Clearly define time and cost.	Mgr	by	16 Mch	
NEP5	Schedule for reporting.	Mgr/RE	by	16 Mch	
EP6	Supervise project operation.	Mgr	15 Mch	24 May	
NEP7	Job description.	RE	by	16 Mch	
NEP8	Agree job description.	RE	by	16 Mch	
NEP9	Identify newspapers.	RE	by	16 Mch	
NEP10	Instruct newspaper.	RE	by	18 Mch	
NEP11	Newspaper adverts appear		1 Apr		
NEP12	Review applications.	RE	2 Apr	10 Apr	
NEP13	Pass newspaper invoice.	RE	by	7 Apr	
NEP14	Unsuccessful applicants.	RE	by	11 Apr	
NEP15	Arrange interviews.	RE	11 Apr	20 Apr	
NEP16	Select shortlist.	RE	20 Apr	21 Apr	
NEP17	Liaise with manager.	RE		21 Apr	
NEP18	Arrange final interviews.	RE	22 Apr	25 Apr	
NEP19	Select and appoint.	Mgr/RE		10 May	
NEP20	Issue employment contract.	RE		24 May	
NEP21	Introduce new employee.	RE		24 May	
NEP22	Welcome new employee.	Team		24 May	

A feedback record such as this enables you to check the tasks that should have been completed by the agreed finish date and to make notes of issues that need attention to bring a project back into line.

This record should also be a reminder to talk with individuals responsible for the completed tasks and to compliment them on their achievements. In fact, you can date the record and pin a copy to the workplace notice board so that everyone involved in the project can see that you are monitoring and noting the tasks that have been completed.

Of course, there will be times when some tasks are delayed. These are deviations from the scope of the project that need to be communicated and acted upon.

Advantages and Limitations of a Project Feedback Record

The advantages and limitations of the Project Feedback Record are as follows:

Project tool:	Advantages:	Limitations:
Project Feedback Record	<p>Provides a written document for future reference.</p> <p>Specifically identifies issues that need attention.</p> <p>Provides a good reference for the final debriefing session.</p> <p>Identifies changes that have to be actioned on the Gantt chart and referenced on the scope document.</p> <p>Proof of the monitoring process.</p> <p>Provides a basis for a Project Deviation report.</p>	<p>It takes time to produce the record.</p> <p>The record is not worth much unless it is acted upon.</p>

2 Identifying deviations from scope and communicating opportunities for corrective action or improvement to relevant individuals/teams

Once you have identified and recorded deviations for a project, using the Project Feedback Record suggested above, you have a written record of the tasks that require attention to bring them back into line. You can use this record in one of two ways:

- As a communication tool to circulate to all relevant stakeholders to draw attention to the deviations that require attention.
- As a personal record from which you can produce a Project Deviation report for circulation to stakeholders.

A Project Deviation Report has the advantage of space in which you can focus on the issues that require attention rather than providing the entire feedback record that also shows tasks completed.

Example

A Project Deviation Report for the new employee project could look something like the following:

PROJECT DEVIATION REPORT dated: 15 March			
Circulation: RE, Team			
Ref:	Task description:	Finish:	Action required:
NEP8	Agree job description.	16 Mch	Job description not agreed by the team; immediate task completion required. (TEAM)
NEP9	Identify newspapers.	16 Mch	Target newspaper not identified; advise chosen newspaper immediately. (RE)
NEP10	Instruct newspaper.	18 Mch	Last day for advertising approaching; advert must be placed in next 24 hours. (RE)

As you can see, this report has the advantage that it:

- Focuses on specific actions required to get, or keep, the project to schedule.
- Identifies the stakeholder(s) responsible for taking corrective actions.
- States required completion dates for the remedial actions.

Important words and ideas: Remedial means correcting something that is wrong or below performance. For example, remedial education is providing special attention to improve the performance of lagging students.

Another important result from using Project Deviation Reports is that, at the end of a project, you have a record of the remedial issues, or changes that had to be addressed during the project.

Advantages and Limitations of a Project Deviation Report

The advantages and limitations of the Project Deviation Report are as follows:

Project tool:	Advantages:	Limitations:
Project Deviation Report	Highlights deviations from original project objectives and timescales. Highlights issues that require attention.	Requires action by a busy manager whose attention might be disrupted for other tasks. Bureaucratic system that can get delayed in a busy

	<p>Identified individuals who are required to correct deviation.</p> <p>Gives details of deviation and action required to correct.</p>	<p>department.</p> <p>Of little use unless it is delivered to action individuals immediately.</p>
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3 Signing off the project - verifying project deliverables as complete as per agreed scope definition or specified requirements

How to debrief a project

When a project has been completed, you should arrange a debriefing session with the internal stakeholders involved in the project. In some cases you might want to also involve external stakeholders such as suppliers and contractors who you may wish to use in the future.

Run the debriefing session through the following stages:

- Ask stakeholders to re-read the scope document before the debriefing meeting.
- At the meeting read out each objective in turn and ask stakeholders to comment on:
 - the validity of the objective
 - the way the objective was managed
 - issues that prevented the objective from being achieved
- Discuss each objective and the points raised by stakeholders.
- Agree how mistakes in this project could have been better addressed.
- Agree any training points for future project employees.
- Issue a debriefing report outlining the conclusions reached at the meeting.

SOMETHING TO KNOW: A DEBRIEFING MEETING IS NOT HELD TO APPORTION BLAME – WHEN BLAME IS A PRIORITY NOTHING IS LEARNED FROM THE PROJECT PROCESSES. IT IS INTENDED TO IDENTIFY ISSUES THAT WILL ENABLE EVERYONE TO LEARN FROM MISTAKES AND TO DELIVER A MORE SUCCESSFUL PROJECT NEXT TIME.

Advantages and Limitations of a Project Debriefing Session

The advantages and limitations of the Project Debriefing Session are as follows:

Project tool:	Advantages:	Limitations:
Project Debriefing Session	<p>Opportunity to discuss how the project progressed and was managed.</p> <p>Good for developing teamwork.</p> <p>Brings stakeholders together to understand what went right and wrong with a project.</p> <p>Identifies problem areas and gives opportunity to improve the business overall.</p> <p>Provides guidelines for improved future performance.</p>	<p>Takes time to organise and run.</p> <p>Can be difficult to get external stakeholders to attend.</p> <p>Can be perceived as a 'blame session'.</p> <p>Stakeholders can become defensive about their personal performances.</p> <p>Senior management might not listen to suggestions for improvement.</p> <p>Improvements might require investment in more resources or training.</p>

Following the debriefing session with the project team, you have one last process to complete; that is to 'close the file'. To close the file you should complete the tasks given below and add one more document to the ring binder before you send it to storage for future reference.

The signing off procedure includes the following tasks:

- Complete a report showing:
 - how each of the deliverables was completed, with details of any variation from the scope document;
 - details of the project debriefing session, noting conclusions and suggestions for future improvements; and
 - lessons learned from the project processes, which can be used to improve the delivery of future projects.
- Circulate the report to all stakeholders, including additional organisational stakeholders who could benefit from the debriefing conclusions.
- File a copy of the report in the ring binder for future reference.

Once you have completed these actions, you can sit back and breathe a sigh of relief – you have successfully managed a good project. Even if the project itself was not entirely efficient,

you will know that you completed the project management process efficiently. You will also be confident that the next project you manage will benefit from the lessons you have learned.

Activity 5

Work with other group members.

List the individuals with whom you need to communicate with after the project is complete. Discuss how you would debrief the stakeholders.

Chapter 2 How to ensure effective project management in organisations

In Chapter 1, we explained the processes that enable you to manage a project successfully, from its origination and definition in a scope document, through the different activities required to achieve a successful outcome. Through that chapter, we identified a number of tools you can use to support your project management processes.

In this chapter, we will reinforce the information about project tools and add more guidance regarding the application or use of those tools.

Unit 1 How to ensure that output of project management tools and techniques meet individual, team and organisational needs or requirements

At the beginning of Chapter 1 we talked about the different people that can make up a project team. In fact, your project team can include many different individuals, all of whom can have personal aims and objectives and therefore personal needs that have to be addressed. When you start a development project and write your Scope Document, it is a good idea to discuss personal needs and objectives and write these into the Scope Document so that you are reminded to address separate needs as you go through the project.

We define the different needs in the following sections.

Individual needs

Individual needs include:

- The tools to complete tasks.
- Time to complete tasks.
- Fair payment for work done.
- Encouragement to do a good job.
- Recognition for good work; this related not only to direct employees but also to project team members from other departments.
- Respect and fair treatment in the workplace.
- The feeling of being part of a successful project team or group, again relating to individuals from other departments as well as employees on the project.

Team needs

Team needs include:

- Clear instructions.
- Management support for the team's work.
- Authority to work to the defined level of delegation in relation to the completion of tasks.
- Recognition of specialist skills provided by certain sections of the project team, such as those provided by town planners.
- Opportunities for discussion and consultation during a project in order to maintain team consensus and cohesion.
- Clearly defined supervisory reporting structure that defines the authority of member(s) in charge.
- Developmental feedback from the manager to address remedial variations in the progress of a project.
- Assurance that the project team is working within the procedures laid down by the department.

Organisational needs

Organisational needs include:

- Loyalty from individuals and teams.
- Employees' participation in consultation processes and a willingness to reach a consensus.
- Assurance that the project team is working within the procedures laid down by the department.
- Employees' willingness to give a fair day's work for a fair day's pay.

- Stakeholders' willingness to turn up for work and meetings to ensure that project tasks are completed on time.
- Completion of project to the quality agreed, on time and within the budget agreed.

Since we have already said that many of these needs cross the boundaries between the groups, you can make sure that the tools and techniques you use for project management provide the following:

- A Scope Document that clearly identifies the resources that individuals and the team need in order to deliver the project successfully. Clear statements in the Scope Document regarding the contribution and expected objectives of external players such as individuals from other government departments.
- Opportunities for discussion and consultation between all parties prior to, and during, a project.
- Regular project monitoring that allows you to:
 - keep the project on schedule;
 - report progress to senior management and other involved officers; and
 - provide feedback and encouragement to the team and its individuals.
- Support and expertise to help individuals and the team to overcome problems and shortfalls in project performance.
- A buffer for management criticism so that you accept the criticism and interpret it into positive feedback and advice for the team and its individuals.
- A fair and equitable approach to employment terms for individuals.
- Integrity in ensuring that external stakeholders who have delivered their tasks to a high standard are recognised and paid on time.
- Positive review of the completed contract that recognises individual and team performance and offers advice to senior management for improvement to organisational processes.

When you address these standards, you are on your way to becoming an exceptional project manager.

Unit 2 Apply corrective action steps where project management tools and techniques usage problems occur

While we showed you, in the last unit, how to ensure that your project management tools and techniques meet the needs of individuals, teams and the organisation, we overlooked the possibility that, despite your best efforts, you can find that a particular tool or technique does not work.

Under normal circumstances, the tools and techniques that we have explained through this book should work for the majority of project situations. However, you need to know what to do if they do not work.

1 What are the potential problems with the usage of project management tools and techniques against project requirements?

We need to consider this question under two headings:

- Problems using project management tools.
- Problems with project management techniques.

We will start with the second of these options because it runs on from our previous discussion.

Problems with project management techniques

Every manager has his or her own way of dealing with the many different activities that comprise a manager's job every day. Every individual has his or her way of dealing with other people; some individuals are outspoken and dominant while others are quieter and more easy-going.

Managing a project is a serious, and sometimes stressful, responsibility that can result in a manager overlooking the needs and requirement of the individuals and the team that will deliver a project. This oversight is non-productive because individuals and teams do not give their best performances when they:

- Are not involved in consultation and discussion about project and task objectives.
- Do not have clear instructions.
- Do not know who is in charge of different tasks.
- Do not receive adequate rewards for work done.
- Do not receive encouragement and motivation or acknowledgement for their positive contributions.
- Do not feel able to raise problem issues for fair resolution.

- Do not have adequate resources.

Therefore, if you find that there is a project management technique problem, it may arise from the way in which you manage people – the stakeholders, officers from other departments, individuals and teams that are required to deliver the project. The old rule that you should "know yourself" is very applicable here and if you are a dominant type of person you might need to consider the effect that this has on the people with whom you need to interact through a sustainable settlement project.

However, a project manager can also face problems arising from the opposite end of the scale. Project managers may find their stakeholders are not willing or able to perform their tasks according to the original plan, for a variety of reasons. PMs may also be blocked by their superiors or others in the process of trying to roll out the project.

Problems using project management tools

The project management tools that we have explained in this book are relatively straightforward and should not cause too many problems. However problems can arise from the following:

- An inaccurate scope document. This can result from poor development but can also be the result of using a scope document that is out of date because a project was delayed.
- Bureaucratic systems. Bureaucracy often involves repetitive form-filling processes that can become very boring. Some individuals develop a hatred of completing forms and deliberately avoid the process, often relying on memory for important information. Highly qualified specialists sometimes consider 'form-filling' to be beneath them.
- Lack of continuity and control over reports. Reports work only when they provide information for action, now or in the future. If the system does not allow for reports and forms to be collected, stored and circulated to interested individuals, it fails to provide the service intended.
- Inadequate closure. The end of a project can leave 'loose ends', which might not have a bearing on project performance, to be finalised, such as passing contractor invoices for payment. The debriefing session we have recommended should tie up all loose ends and provide a positive outcome for the organisation. If this final action is not done, the project can lose its optimum value because the possibility for future improvements and savings has been lost.

So, how can you address any problems you face?

2 Possible solutions to project management problems

When looking for solutions, we have to again consider the different categories mentioned above.

Solutions to problem management techniques

We mention in the previous section that people differ in the ways in which they deal with others; we suggested the difference between dominant and easy-going.

You do not have to change your basic character to be a good project manager.

However you do need to develop certain characteristics in the way that you manage people, which include:

- Understand the people for whom you are responsible. Identify their strengths and weaknesses and understand how to address their personal needs.
- 'Walk the talk', by keeping in constant touch with your people and the work they are doing.
- Always encourage individuals to do their best job; offer advice on improvement without taking over the task.
- Always give praise in public, personal feedback on poor performance in private.
- Always work within the organisation's rule and standards.
- Learn how to 'manage your boss' in the same way that you manage the members of your team. Do this by building a sound relationship built on trust that enables you to openly discuss any problems with him or her.
- Display personal integrity - be firm and fair in all your dealings and never promise something that you cannot deliver.
- Support your people, even in relation to more senior managers, while also acknowledging the organisation's rules and standards. In other words, make sure that you people know the corporate rules that apply but be prepared to defend your people from any unfairness from senior management.
- Acknowledge your mistakes and take immediate action to remedy them.

Example

In a medium-sized engineering company, the Managing Director was very straight-talking and refused to put up with any nonsense; he was always very firm in pay negotiations. He had a daily routine - he 'walked the talk'. Before going to his office he visited every employee in the company, sometimes only for a few seconds, sometimes longer, to wish them "Good Morning" and to ask about the work they were doing. It became natural for employees to raise their problems, which the MD always addressed. Often, the MD would ask about family members, such as a child's progress at school. The whole process took him less than one hour every day and he had a detailed knowledge of everything happening in the company and how he could motivate each employee.

When a project was threatened because of an imminent dock strike, the employees decided to work overnight, without extra pay, to get a machine to the docks before the strike started. They said they "wanted to show appreciation for the best boss in the world".

How long would it take you, each day, to communicate with your team members in a similar way to the MD above? Perhaps a few minutes each day will help you to build the level of team involvement that would guarantee successful projects every time.

Solutions to problems with project management tools

If you find that project management tools are not effective, you can address the shortfall by:

- Re-writing an ineffective scope document. This action can be stressful if the project has already started but you will find that access to an effective scope document will make the ongoing management of the project much easier because it is based on accurate information.
- Observing the bureaucracy. This can be difficult if you hate completing reports or forms. If you are lucky enough, perhaps you can have a deputy to whom you delegate the task but most managers have to complete their own reports and forms. Be honest with yourself, accept your dislike of bureaucracy, and motivate yourself by aiming at managing the project to the highest possible standard. With that in mind you might find the bureaucracy more acceptable because it contributes to an outcome you want.
- Ensuring control and continuity over reports and forms by making sure that they are delivered, if necessary by you personally, to the required stakeholders. You can also check stakeholders' interests by asking questions about the project's progress when you next communicate.

- Always closing a project properly and completely, by discussing the outcomes with as many of the stakeholders as possible and by delivering conclusions (which might only be a short list of bullet points) to other managers in the organisation.

For the most part, you can deal with project management problems and solutions as they arise though it is always a good idea to make reference to a problem and solution implemented in a Project Feedback Record. Sometimes, however, you might need to refer a problem to a senior manager or someone in higher authority.

3 When and how to consult with higher authority

The types of problems that you should refer to a higher authority include the following:

- When a re-written scope document results in major changes to deliverables (quality, time or cost).
- When you are unable to address and meet deliverables in the existing scope document.
- When you do not have the resources to deliver the project objectives.
- When you discover that a project team member has been involved in theft or dishonesty.
- In the event of bribery from an external stakeholder.
- When faced with individual or employment issues that might lead to an employee's dismissal.
- When a team member displays a lack of required skills that can only be addressed by personal training and development. Note that this can include *your* personal performance or training needs to address any difficulties you have with managing people.
- When there is an irresolvable breakdown in the relationship between individuals, team and project manager.
- In the event of inappropriate pressure, bullying or lack of reasonable cooperation from a senior stakeholder.

When you have to refer a problem to a higher authority for solution or action, it is important to follow these principles:

- Ensure that you present very detailed and accurate information, which should include the true reasons for the problem. There is nothing worse than a senior manager finding errors in your information. Avoid exaggerating any issue; provide an explanation exactly as it is.

- Try to add your suggestions, and options, for a solution to help senior management to save time. If the probable solution will cost more time or money, give an accurate assessment of the extra time or cost.
- Always start with your immediate superior and get his or her support if the problem needs to be referred higher up the chain of command.
- Always work to the rules and guidelines laid down by the organisation. They are there to support and protect you as well as to protect the business.
- Be prepared to support your request by attending a meeting to answer questions. Good preparation is likely to achieve the best resolution to a problem.

Provided that you follow the suggestions we have made above, you should get the support you want from higher authorities and you should receive instructions on how to address the problem. Your next action is to implement that solution.

Having completed this chapter, you should now have all the knowledge and tools you need to manage projects other than very large and complex projects that require a specialist and experienced project manager. As you manage more and more projects, you will find that the processes get easier as they get more familiar and you will be able to produce excellent results.

Remember that a project is any activity that cannot be completed by you instantly – it needs more than one person, time and money to achieve the required end result.