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**Project Management**

**TIPS**

**From web projects through  
to major change projects**

**Project Agency**

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## Why Write This Booklet and Who Wrote It?

Ron Rosenhead is Managing Director of Project Agency. He believes the modern day manager needs project management skills to deliver the organisations' agenda. He therefore decided to write this book to help support them. The writing of this Tips Booklet fits nicely with the company motto "**Helping organisations deliver projects effectively.**" The word project can be misleading. Many people think of large scale building works or changes in information technology. Your project may not be as big as those quoted; preparing and writing a report, developing an internet product alongside marketing and sales plan, relocating an office. They all need careful planning.

This tips booklet is based on the unique Project Agency Project Management System - PMS. It has been used in many organisations and is a tried and tested and very flexible model.

This booklet will help you in many ways:

- Providing you with a structure to manage your projects
- Giving practical advice based on over 10 years of running workshops and projects
- Answering many of the questions posed by people involved in projects
- Using it to check current project management practices in your organisation

You, the reader may be a one person business or working in a global company with many thousands of workers. This book is written for all of you!! We mention senior managers. If you work alone, you are the senior manager! Please adapt the content to fit your situation.

Ron has worked in the project and change management field for many years. He is passionate about project management and formed Project Agency in 1995. Since then, he has written articles and spoken at conferences and run many many project management events for a vast array of organisations.

Project Agency run a wide variety of training events around the world, so do go to [www.projectagency.com](http://www.projectagency.com) for further information or contact us on [events@projectagency.com](mailto:events@projectagency.com)

Good luck with all your projects and we would be delighted to receive feedback about the content of this booklet as well as how you have managed to apply it.

Happy Reading



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**This Tips Booklet has been produced for open distribution to anyone. Please feel free to pass it onto friends or colleagues. We would be delighted to hear how you used this book and how useful it has been in supporting the delivery of your project.**

**If you want something more in-depth try our e-book; [Deliver That Project, a Step-by-Step Training Guide](#). Go to [www.deliverthatproject.com](http://www.deliverthatproject.com) or send an email to [events@projectagency.com](mailto:events@projectagency.com) Finally, good luck with all of your projects. We would be delighted to talk with you about any project management issues you may have. Do call +44 (0)20 846 7766 or email [events@projectagency.com](mailto:events@projectagency.com)**

## Project Management Tips

### Getting Started – Initiation

1. Develop a solid business case for your projects. Where appropriate, ensure you obtain senior managers' agreement before you start the project. Research points out that too many projects are started without a firm reason or rationale. Developing a business case will identify whether it is worth working on.
2. Ensure your project fits with the key organisational or departmental agenda or your personal strategy. If not, why do it? Stick to priority projects.
3. Carry out risk analysis at a high level at the initiation stage. Avoid going into great detail here – more an overview focussing on the key risks.
4. Identify at this early stage key stakeholders. Consider how much you need to consult or involve them at the business case stage. Seek advice if necessary from senior managers
5. Where appropriate, involve finance people in putting the business case together. They can be great allies in helping crunch the numbers which should give credibility to your business case.

### Defining Your Project

6. Produce a written project definition statement (sometimes called PID) and use it to inform stakeholders – see point 13. This document is 'your contract' to carry out the project and should be circulated to key stakeholders.
7. Use the project definition statement to prevent creep. Use it to prevent you going beyond the scope of the project through its use in the review process.
8. Identify in detail what will and will not be included in the project scope. Avoid wasting time by working on those areas which should not be included – identify these in the PID.
9. Identify who fulfils which roles in your project. Document them on the PID. Include a paragraph to show what each person does.
10. Identify who has responsibility for what in the project e.g. project communications is the responsibility of AD. This helps reduce doubt early in the life of the project.

11. Think 'Team Selection' – give some thought to who should be in your team. Analyse whether they have the skills required to enable them to carry out their role? If not, ensure they receive the right training. Check they are available for the period of the project. NOTE: this includes any contactors you may need to use
12. Form a group of Project Managers. The Project Manager role can sometimes be very lonely! Give support to each other by forming a group of Project Managers.
13. Identify who the **stakeholders** are for your project – those affected and 'impacted' by the project. This should be an in- depth analysis which needs updating regularly.
14. Recognise early in the life of the project what is driving the project. Is it a drive to **improve quality, reduce costs** or hit a **particular deadline?** *You can only have 1.* Discuss with the sponsor what is driving the project and ensure you stick to this throughout the project. Keep "the driver" in mind especially when you monitor and review.
15. Hold a kick off meeting (Start up Workshop) with key stakeholders, sponsor, project manager project team. Use the meeting to help develop the PID (see Tip 6). Identify risks and generally plan the project. If appropriate hold new meetings at the start of a new stage.
16. Ensure you review the project during the Defining Your Project Stage – involve your sponsor or senior manager in this process. Remember to check progress against the business case.

## Delivery Planning

17. Create a work breakdown structure (WBS) for the project. A WBS is a key element you will need to develop your plan. It lists out all of the activities you will need to undertake to deliver the project. Post it notes can be a great help in developing your WBS.
18. Group tasks under different headings once you have a list. This will enable you to identify the chunks of work that need to be delivered, as well as put together the Gantt chart and milestone chart.
19. Identify dependencies (or predecessors) of all activities. This will let you put together the Gantt and milestone charts. Ensure you write them down otherwise you are trying to carry potentially hundreds of options in your head.

20. Estimate how long each activity will take. Be aware that research points out we *are notoriously bad* at estimating. You estimate a task will take 3 days. Identify how confident you are that you can deliver in 3 days by using %  
e.g. I'm only 40% certain I can deliver in 3 days. You should aim for 80%. If you do not believe you can achieve 80% then re-calculate
21. Identify the critical path for the project. The critical path identifies those activities which have to be completed by the due date in order to complete the project on time.
22. Communicate, communicate, communicate! Delivering a project effectively means you need to spend time communicating with a wide range of individuals. Build a communication plan and review it regularly and include it in your Gantt chart.
23. Are you involved in a major change project? If you are, think through the implications of this on key stakeholders and how you may need to influence and communicate with them.
24. Conduct Risk Assessment – carry out a full risk analysis and document it in a risk register. Regularly review each risk to ensure you are managing them, rather than them managing you. Appoint a person to manage each risk.
25. Develop a Gantt chart and use it to monitor progress against the plan and to involve key stakeholders in the communications process.
26. Draw up a milestone plan. These are stages in the project. You can use the milestone dates to check the project is where it should be. Review whether activities have been delivered against the milestone dates and take a look forward at what needs to be achieved to deliver the next milestone.

### **Project Delivery – Monitoring and Reviewing Your Project (Project Governance)**

27. Have a clear project management monitoring and reviewing process – agreed by senior managers - the project sponsor and the project Board, if you have one.
28. Ensure your organisation's corporate governance structure and your project management monitoring and control structure are compatible. If you do not know whether this is the case then seek senior management involvement.
29. Be aware early in the project what will be monitored, how they will be monitored and the frequency.

30. Keep accurate records of your project not only for audit purposes but to ensure you have documents which enable you to monitor changes.
31. Use a Planned v. Actual form. It is easy to create – it allows you to monitor how you are progressing with specific tasks – time and money. Link these forms into milestone reviews.
32. Identify with your sponsor the type of control that is needed – loose or tight or a variation of these, e.g. tight at the start, loose in the middle, tight at the end. Ensure the system you develop reflects the type of control intended.
33. Agree a system for project changes – have an agreed system for monitoring and approving changes. Use change control forms and obtain formal sign off (agreement) by the sponsor, *before* action a change. Look for the impact of the change on the project scope as well as the “key driver” - quality, and cost and time.
34. Appoint someone to be responsible for project quality especially in larger projects. Review quality formally with the client at agreed milestone dates.
35. Make certain you have agreed who can sanction changes in the absence of your sponsor. If you haven’t agreed this, what will you do in their absence?
36. Set a time limit for project meetings to review progress. Have an agenda with times against each item and summarise after each item at the end of the meeting.
37. Produce action points against each item on the agenda and circulate within 24 hours of the meeting. Use these action points to help in the creation of your next agenda.
38. Review the items on the critical path checking they are on schedule. Review risks, review yours stakeholders and your communication plans and whether you are still on track to deliver on time, to budget and to the required quality standard.
39. Set a tolerance figure and monitor e.g. a tolerance figure of  $\pm 5\%$  means as long as you are within the 5% limit you do not have to formally report. If exceed the 5% limit (cost or time) then you need to report this to the agreed person – probably your sponsor
40. Report progress against an end of a stage – are you on schedule? Time, cost or quality? Ensure that if something is off schedule the person responsible for delivering it suggests ways to bring it back on time, within budget or to hit the right quality standard.
41. Develop an issues log to record items that may be causing concern. Review at your project meetings.

42. See whether you are still delivering the original project benefits when reviewing your project. If not, consider re-scoping or if appropriate abandoning the project. Do not be afraid of abandoning a project. Better to abandon now rather than waste valuable time, money, and resources working on something no longer required. If you close a project early – hold a project review meeting to identify learning.
43. Produce one-page reports highlighting key issues. Agree the areas to include with the Sponsor before writing a report.
44. Use a series of templates to support the monitoring process, e.g. milestone reporting, change control, log, planned v. actual. Contact [events@projectagency.com](mailto:events@projectagency.com) for more information.
45. Apply traffic lights to illustrate how you are progressing – red, amber and green. Use these in conjunction with milestone reports.
46. Engender honest reporting against specific deliverables, milestones, or a critical path activity. If you do not have honest reporting imagine the consequences.

## **Closedown and Review**

47. Agree well in advance a date to hold a post project review meeting. Put this onto the Gantt chart.
48. Invite key stakeholders, sponsor, and project team to the post project review. If the date is in their diary well in advance it *should* make it easier for them to attend
49. Focus your meeting on learning – identifying what you can use on the next project. Share the learning with others in the organisation.
50. Check whether you have delivered the original project objectives and benefits and not gone out of scope.
51. Make sure that you have delivered against budget, quality requirements and the end deadline.
52. Understand how well you managed risks and your key stakeholders. Use questionnaires to obtain feedback.
53. Prepare a list of unfinished items. Identify who will complete these after the project and circulate to any stakeholders.

54. Hand over the project formally to another group (it is now their day job) - if appropriate. You may need to build this into the project plan and involve them early in the plan and at different stages throughout the project.
55. Write an end of project report and circulate. Identify in the report key learning points.
56. Close the project formally. Inform others you have done this and who is now responsible for dealing with day to day issues.
57. Celebrate success with your team! Recognise achievement, there is nothing more motivating.

### General Tips

58. **But what is a project?** Why worry whether something is a project? Why not use some of the project management processes, e.g. stakeholder analysis or use of traffic lights to manage your work? The key principle is to deliver the piece of work using the appropriate tools. We use the term **project based working** to describe this approach.
59. Get trained! Research points out that only 61% of people have received any project management training. Contact Project Agency on Telephone No: +44 (0) 208 446 7766 or email [events@projectagency.com](mailto:events@projectagency.com) for more information.
60. Ensure you have the buy-in of senior managers for your project. You will need to work hard to influence upwards and get their support.
61. What about the day job? Projects get in the way and the day job gets in the way of projects! Many people have found that by applying project based working to day to day activities and by being more rigorous on project work, *more* is achieved.
62. Identify early on in the life of the project the priority of your projects. Inevitably there will be a clash with another project or another task. Use your project management skills to deliver and your senior management contacts to check out the real priority of the project.
63. Discover how project management software can help. But, you will need to develop the business case, produce a project definition alongside planning what will go into the software. Many project managers use simple Excel spreadsheets or charts in word to help deliver their project.

**Good luck in delivering your project!**

## About Project Agency

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Project Agency was formed to help people and organisations deliver projects effectively. Its philosophy was developed early in our history and is still with us today. We work in organisations:

- demystifying project management with professionals at all levels
- developing core skills – of project managers, their teams and project sponsors
- providing written guidelines and protocols for staff to deliver projects in consistent and effective way
- helping those involved in the project management process to recognise the need to further develop their people skills as well as their project management skills.

We have a range of staff who support us in delivering the above philosophy. They are all well trained and work flexibly with clients.

## What does the Project Agency do?

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We list below a range of services to our clients. Please note that we customise much of what we do to meet organisational and individual needs. Our services include:

- Delivering practical project management training:
  - ▶ designed to ensure project managers and project team members understand the processes and skills to deliver effectively
  - ▶ customised to meet specific needs – really targeting organisational needs
  - ▶ working with project teams focusing on delivering a specific project – alongside developing their team skills
  - ▶ running PRINCE2 qualification programmes or PRINCE2 training workshops
- Developing in-house project management systems i.e. a customised project management system ensuring consistency of approach - complete with templates
- Running training sessions for project sponsors and project board members – to help develop their role effectively

- Carrying out audits of projects – after project completion, end of stage or an audit of internal project management approaches.
- Organising and running start up workshops for groups pre project – ensuring projects get off to a really effective start
- Developing effective business cases.
- Effective project leadership training.
- Working with senior managers identifying the key projects for the organisation and their priority
- Individual coaching support to project managers and project sponsors
- Developing programme management strategies and establishing project (programme) support offices

### **Do get in touch to discuss your needs:**

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**This Tips Booklet has been produced for open distribution to anyone. Please feel free to pass it onto friends or colleagues. We would be delighted to hear how you used this book and how useful it has been in supporting the delivery of your project.**

**If you want something more in-depth try our e-book; [Deliver That Project, a Step- by- Step Training Guide](#). Go to [www.deliverthatproject.com](http://www.deliverthatproject.com) or send an email to [events@projectagency.com](mailto:events@projectagency.com)**

**Finally, good luck with all of your projects. We would be delighted to talk with you about any project management issues you may have. Do call +44 (0)20 846 7766 or email us on [events@projectagency.com](mailto:events@projectagency.com)**

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