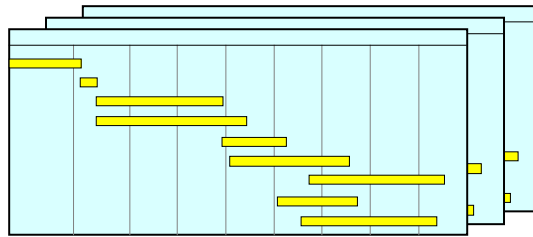


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PROJECT MANAGERS' MANUAL

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1. INTRODUCTION

This manual is designed to provide a project management framework and guidance for those who manage small and medium-sized projects. This framework is compatible with the PRINCE2 methodology which is often used in the UK for major projects, but is far simpler and more flexible.

It is designed to be used with the e-learning support tool "How to Manage a Project". This contains further guidance and help, and includes a step-by-step guide to scoping and planning a project and creating a project plan, a template for which is included in this manual.

The manual includes guidance, checklists, and a template for a Project Plan. With those, it can be used by project managers as a "project health-check".

2. OUR APPROACH TO MANAGING PROJECTS

For many organisations, much of the change and development that they will undergo in the future will need to be managed as projects. Projects are simply the best way to manage the introduction of such changes. Some of these projects will be major organisation-wide projects and IT projects, some medium-sized cross directorate, and some will be smaller projects local to a particular area.

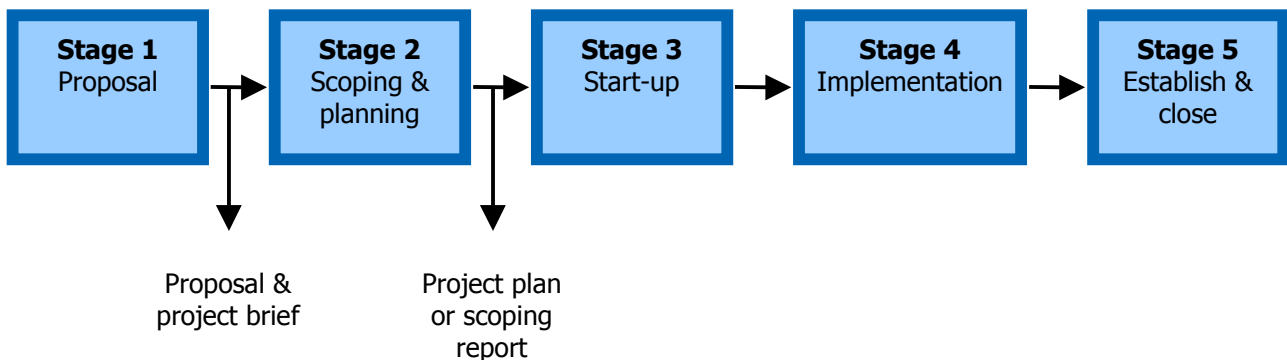
All organisations that manage projects on a regular basis develop a set of "groundrules" that summarise the way projects are managed in their organisation. The following are the groundrules employed by one organisation. They apply to all projects but will need to be tailored to suit a particular project.

In most cases the major organisation-wide and IT projects will be managed within the PRINCE2 project management methodology. However, that methodology is not entirely suited to all our medium-sized and smaller projects and the approach described here should be followed. It is simpler and more flexible than PRINCE2 but is compatible in that it follows the same principles and approaches.

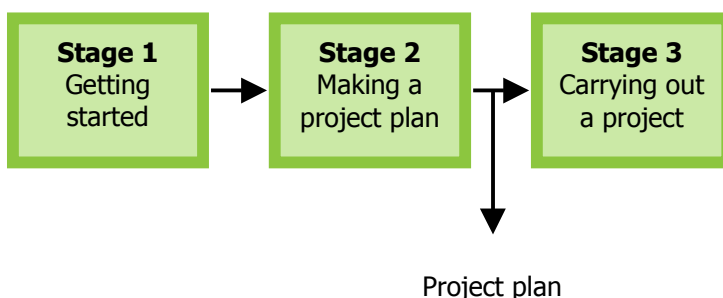
2.1 Projects are best managed through a broad structure of stages

Projects progress through stages.

- For major organisation-wide projects and IT projects the PRINCE2 stages should be used
- For medium-sized projects the stages used are:



- For small projects the stages used are:



2.2 Project organisation

Generally, our projects should have a formal Project Manager and Project Sponsor. The Project Manager is responsible for delivery of the project. The Project Sponsor is responsible for looking after the project and the outcomes on behalf of the organisation, and supporting the project manager. The sponsor may be an individual or a project board or similar.

2.3 Project proposal

Major and Medium-sized projects should generally start with a Project Proposal stage. This covers the initial work involved in looking at the issues and options, benefits and costs, and how the project fits with business plans. This should eventually establish - "this is what we will do and what we will deliver". This is summarised in a Project Brief, and after this is agreed, the project is formally started.

2.4 Projects are always scoped

All projects to have a Project Scoping Stage where the Project Manager has the opportunity to scope the project. This stage will normally last a few days (or weeks for larger projects). It will focus on clarifying what the project objectives and terms of reference are, what the issues are, and how the project should be organised and tackled.

2.5 Project plan or project scoping report

The conclusions of the scoping study should be summarised in a brief (typically 2 to 5 pages) Project Plan describing what the project is to achieve and how it will be organised and tackled. It should cover the following:

- **Terms of Reference and Objectives**
- **Benefits & Costs**—benefits to be realised and costs and disruption to be contained
- **Top Level Plan**—showing planned progress in terms of stages, milestones and activities
- **Project Organisation**—showing who is involved and the key responsibilities, such as project manager, project sponsor, team and contributors. Also the financial and project controls to be used.
- **Risks and implementation issues** which may occur

2.6 Project control and reporting

- Project progress needs to be monitored and controlled usually by means of discussions, meetings, and project reports. The precise form of project control is often established to suit the particular project.
- As well as project specific procedures, the project manager will need to follow particular organisation-wide procedures, such as Contracts, Finance, IT, and human resources.

2.7 Projects may be coordinated within programmes

Many organisations coordinate individual projects via a number of strategic programmes. Each programme is built from a portfolio of interrelated projects, all contributing to a common outcome. Some of our projects are coordinated and sponsored in this manner.

3. GETTING STARTED

The early days of a project are always important—they provide a window of time in which you as project manager can question items and negotiate some changes. Later in the project it becomes more difficult to do this. This stage is about that period and about preparing the ground—getting the foundations in place to make managing the project an easier task.

The purpose of this stage is to get your project to a state where the ground is prepared in terms of:

- project sponsorship
- agreement to a Project Scoping Study
- understanding of stakeholder requirements and the level of support for the project
- and forewarning and preparation of those likely to be working on or contributing to the project

On the next page you will find a "Getting Started Checklist". This contains a list of eight key questions that experienced projects managers ask about their project as soon as they are asked to carry it out. They use it to identify areas of concern and issues which they then try to remedy whilst they can. They may use the list as the agenda for an initial meeting with their Project Sponsor.

If you are just beginning a project, use the checklist yourself to identify any areas of concern you might have and to see what needs to be done about them.

If you then visit the e-learning tool "How to Manage a Project" you will find additional tools and tips in particular:

- for concerns about the Stakeholders, "Mapping Stakeholders" can help.
- for concerns about support for the project, try the force-field tool in "Gaining Support".
- for concerns about getting resources, see the tips in "Getting Resources—Tips"

Getting Started Checklist

Am I clear what I am being asked to undertake?	
Establishing what the project is about will be a key part of the project scoping study.	
What type of project is it and what work is likely to be involved?	
<p>In broad terms, think about the project and the sort of work that is likely to be involved. Some projects simply need to be planned and implemented, whereas others need a preliminary stage of data collection and analysis or opinion surveys.</p> <ul style="list-style-type: none"> • In particular, at what stage is the project? Is it in the "Proposal" stage where you need to develop a proposal and business case, or can you move straight into planning, and implementation? • Finally check with others to see if work has been done on similar projects elsewhere, and also whether there are other projects that link to or depend on yours. 	
Who is the Project Sponsor? Whom am I doing this for?	
Try to clarify whom you are doing the project for—who is your project sponsor. If your sponsor is a committee, is there one single individual who will act as your prime sponsor and contact, on their behalf?	
Have I the agreement to carrying out a Project Scoping?	
In the ideal world the Sponsor would have asked you to scope the project but that does not always happen. Try to get their agreement to you scoping the project and producing either a project brief or project plan. Alternatively, do it and talk the plan through with them when the time is right.	
Who are the main Stakeholders and what do they want from the Project?	
Map out the main "stakeholders of the project"—those who have a vested interest in it and its outcomes, and establish what they require from the project.	
What support in the organisation is there for the project?	
Who is likely to be for it and who against it? If the project involves organisational change, try to identify those who will support the project and those who may resist it.	
What Resources can I use and what do I need?	
<p>What Finance do I need and where will it come from? Whose help and skills will you need to carry out this project?</p> <ul style="list-style-type: none"> • Who should be on my team and how should I get them involved? • Who might be interested in this and might help me at times? • What key contributors will have to be forewarned and booked to help? (IT, HR) 	
Are there any significant Risks in the Project?	
At first sight, what are the likely risks of the project—implementation issues that might throw the project off-course?	

4. MAKING A PROJECT PLAN

Assuming the "Getting Started" stage has gone well, you should now carry out a scoping study and use the results of this to produce a Project Plan.

Such a study may take only a few days but that depends on the size of the project. In most cases it is simply thinking and planning, based upon existing knowledge and often involving no more than an hour or two. In others it may involve discussions with key stakeholders (those with a vested interest in the project) and potential team members and contributors.

If a team is involved in the project, it is invariably best to scope a project as a team. Basically there are five steps to go through in scoping a project. In summary they are:

Step 1: Project Objectives and Terms of Reference

What the project is there to achieve and by when. Best done by:

- **Stakeholder Analysis:** Reviewing the various stakeholders of the project (those with a vested interest in the project and its outcomes) and establishing the criteria by which they will assess the project.
- **Develop Project Terms of Reference:** Developing these to satisfy stakeholder requirements, as far as is possible. Consists of an overall definition and description of the project and its aims, supported by project objective for each of the major stakeholders.

Step 2: Project Benefits & Costs

The benefits and costs of doing the project. Initiator, sponsors, project manager and team need all to be clear about these before investing time, effort and energy into a project. To also cover how the project fits into other organisational initiatives and projects. The depth depends on the project - in many organisational project, a simple brainstorm is sufficient. The details are often used later when marketing and communicating the project.

Step 3: Top-Level Plan

Certainly a top-level plan (project stages) and if possible milestones/Gantt charts showing planned progress.

Step 4: Project Organisation

- **People:** Those actively involved in carrying-out the project—project sponsor, project manager, the project team—and the key responsibilities and delegations. Any other key contributions needed—specialist support, contractors, and others.
- **Project Control:** Planned review meetings (sponsor/manager), team meetings, and end-of-phase reports.

Step 5: Implementation Issues & Risks

Identification of key likely implementation issues and general strategies (pilots, surveys) for resolving or avoiding them.

Project Scoping Plan

1. Title of project, Project Manager, and Project Sponsor
2. Background to the project
3. Terms of Reference & Key Objectives
Overview
Key deliverables
Objectives per key stakeholder
1.
2.
3.
4.
5.

4. Benefits & Costs Analysis	
Key Benefits	Key Costs
5. Risk Assessment (High Likelihood–High Impact)	
6. Resources likely to be needed	
7. Costs estimates & required budget	
8. Proposed project organisation	
Project Manager:	
Project Sponsor:	
Team members:	
Key contributors:	
Others:	

5. CARRYING OUT A PROJECT

The Project Manager now needs to get the project moving and keep it on the move. For many projects, it can be useful to split this stage into two parts - "Start-up" and "Implementation".

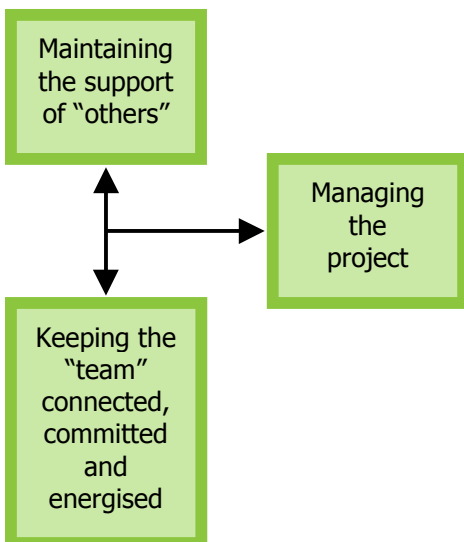
5.1 Start-up

Is a defined period in which all involved concentrate on start-up activities. This is particularly useful in complex projects where there are a large number of stakeholders, complicated activities to organise, or changes that people are uncertain about.

It is in this period that any "long-lead-time" items are organised e.g. contracts and contractors, facilities and equipment, finance, and awareness-raising sessions. It can also be the period during which you undertake any data analysis, interviews, or customer/attitude surveys.

5.2 Implementation

The work in this stage varies from project to project. Some projects involve the co-ordination of large numbers of contributors whilst others involve managing technical complexity. It is impossible to be too prescriptive but generally work in this stage involves action on three fronts:



- **Managing the support of "others":** Keeping in contact with the key stakeholders to ensure that they are still supportive of the project and are up to date on progress - as is relevant to them.
- **Managing and progressing the project:** Often this is the main work for the project manager—keeping in touch with the individual activities and tasks that have been planned and progress chasing to keep them on track—particularly any which could delay the project. Updating the planning to reflect any changes or delays and look ahead for "Roadblocks".
- **Keeping the "team" connected, committed, and energised:** Keeping all who are contributing to the project, the team if you have one but also any key contributors, up to date with the relevant facts and maintaining their commitment to the project. Communications and leadership are the two keys to this.

Checklist: Carrying out the project

1. Start-up activities

What start-up activities are needed, if any? Think particularly about long-lead time items, awareness raising and communications, and data collection.

2. Implementation

Maintaining Support

What are the difficulties/key issues? Are there any particularly difficult stakeholders?

What can to be done to resolve these?

Progressing the project

Which activities are time-critical? Any other difficulties/key issues?

What needs to be done? Which activities must be monitored closely?

Keeping team and contributors committed and connected

What are the difficulties/key issues? Will particular contributors give problems?

What needs to be done?