EASITRAIN Training: Project Management Part 2

21-22 March 2018

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enable2change

Contents

- Project scheduling methods
- Resource and cost planning: overview
- Design of project organisations
- The role of the project manager, project owner, project team members
- Specific challenges and potentials of research projects
- Project leadership in research projects
- Examples of research projects
- Summary and assignment for Vienna module

Working Approach

- Inputs, case studies
- Group works
- Feedback, reflections, discussions
- Training on the Project
  - Working situations as in a real project
  - Benefit for own practice
  - Basis for standard plans
- Cyclic learning approach
  - Theoretical inputs
  - Application on your cases
  - Common reflection
  - Further inputs
- Documentation: additional slides, flip charts

Trainer

- Professor, Head of Project Management Group in the Department Strategy & Innovation, Academic Director Professional MBA: Project Management
- Co-founder and manager of the enable2change network, some 20 years experience as trainer and consultant
- Board member of project management austria

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Project Scheduling

Project Scheduling

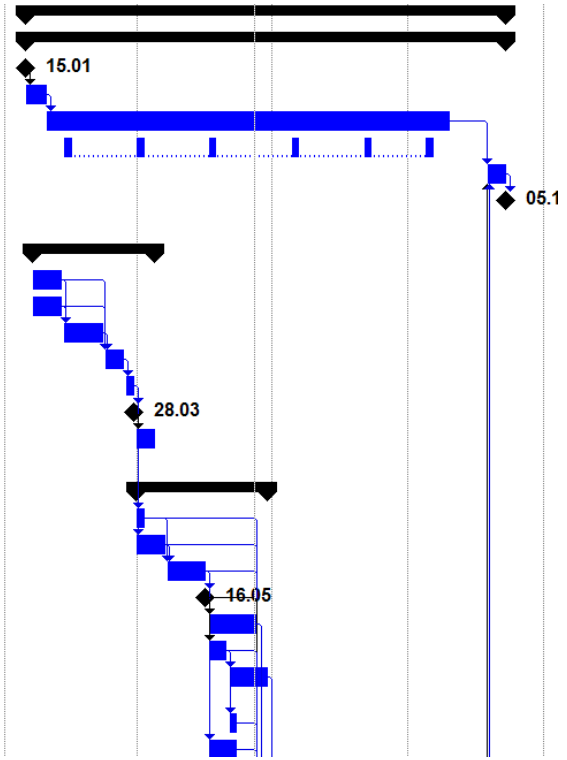
- Depth and detail of scheduling depends on the complexity, dynamic and context of the project
  - Milestone plan
  - Networked Bar Chart
  - CPM Schedule
- Milestone plan
  - Most important events in the progress of the project
  - 2 standard milestones:
    - project assigned
    - project approved
- Networked barchart
  - Shows the durations of the single work packages /phases
  - Additional detailing can be provided with dependencies and leads/lags

Project Milestone Plan: Example

WBS-Code	Milestone	Planned date	Adapted date per ...	Is date
1.1.1	project assigned	15.01.2014		
1.2.6	presentation to project sponsor performed	28.03.2014		
1.3.4	"process landscape new" developed	16.05.2014		
1.3.11	discrete concepts finalized	27.06.2014		
1.4.5	(complete) concept with essential stakeholders coordinated	22.08.2014		
1.4.9	next steps decided	03.10.2014		
1.5.5	first implementation measures performed	14.11.2014		
1.1.6	project approved	05.12.2014		

Networked Bar Chart: Example

1	**concept and first implementations in a transformation**	**Wed 15.01.14**	**Fri 05.12.14**
1.1	**project management**	**Wed 15.01.14**	**Fri 05.12.14**
1.1.1	project assigned	Wed 15.01.14	Wed 15.01.14
1.1.2	project start	Wed 15.01.14	Tue 28.01.14
1.1.3	project coordination	Wed 29.01.14	Tue 28.10.14
1.1.4	project controlling	Mon 10.02.14	Fri 17.10.14
1.1.5	project close down	Mon 24.11.14	Fri 05.12.14
1.1.6	project approved	Fri 05.12.14	Fri 05.12.14
1.2	**is analysis of optimization potentials**	**Mon 20.01.14**	**Fri 11.04.14**
1.2.1	performance SWOT company	Mon 20.01.14	Fri 07.02.14
1.2.2	performance SWOT selected departments	Mon 20.01.14	Fri 07.02.14
1.2.3	performance of a market analysis	Mon 10.02.14	Fri 07.03.14
1.2.4	analysis and interpretation of selected KPIs	Mon 10.03.14	Fri 21.03.14
1.2.5	summary and presentation of results	Mon 24.03.14	Fri 28.03.14
1.2.6	presentation to project sponsor performed	Fri 28.03.14	Fri 28.03.14
1.2.7	performance of first communication measures to employees	Mon 31.03.14	Fri 11.04.14
1.3	**development of a concept for the new-positioning of the company**	**Mon 31.03.14**	**Fri 27.06.14**
1.3.1	definition of possible new clients and markets	Mon 31.03.14	Fri 04.04.14
1.3.2	identification and short description of new or adapted services	Mon 31.03.14	Fri 18.04.14
1.3.3	development of a "process landscape new"	Mon 21.04.14	Fri 16.05.14
1.3.4	"process landscape new" developed	Fri 16.05.14	Fri 16.05.14
1.3.5	rough description of (new or adapted) processes	Mon 19.05.14	Fri 20.06.14
1.3.6	development of a optimized organisation chart	Mon 19.05.14	Fri 30.05.14
1.3.7	adaption of job descriptions, negotiation with management/employee representations	Mon 02.06.14	Fri 27.06.14
1.3.8	deduction of new qualification programs and training concept	Mon 02.06.14	Fri 06.06.14
1.3.9	rough specification of necessary changes in the existing infrastructure (IT,	Mon 19.05.14	Fri 06.06.14



Project Scheduling: Best Practice

- Milestone plan
  - Milestones should be scheduled in regular intervals
  - Event-oriented formulation (no duration)
  - Clear relation to work packages: start or at end of a work package
- Networked bar chart
  - Dependencies when meaningful
  - Adequat detailing – relation to project controlling
  - No black boxes
- Visualisation
- Appropriate level of scheduling according to the target group

Project Resources, Project Costs

Project Resources

- Objective
  - To determine and display the required project resources over time and
  - To determine the over- and under-allocation of project resources with the project resources available
- Specific consideration of scarce resources
- Typical resources are
  - Personnel with different qualifications
  - Equipment
  - Finance
  - Materials
- Based on work breakdown structure

(pm baseline, 2009:34)

Project Costs

- Project resource plan is the basis for the project cost plan
- Objective: To plan and document project costs and to provide a clear overview on project costs and their development
- Typical cost types
  - Personnel costs
  - Material costs
  - Equipment costs
  - Administrative and sales costs
  - Other costs
  - Etc.
- Based on work breakdown structure

(pm baseline, 2009:35)

Project Resource and Cost Plan: Best Practice

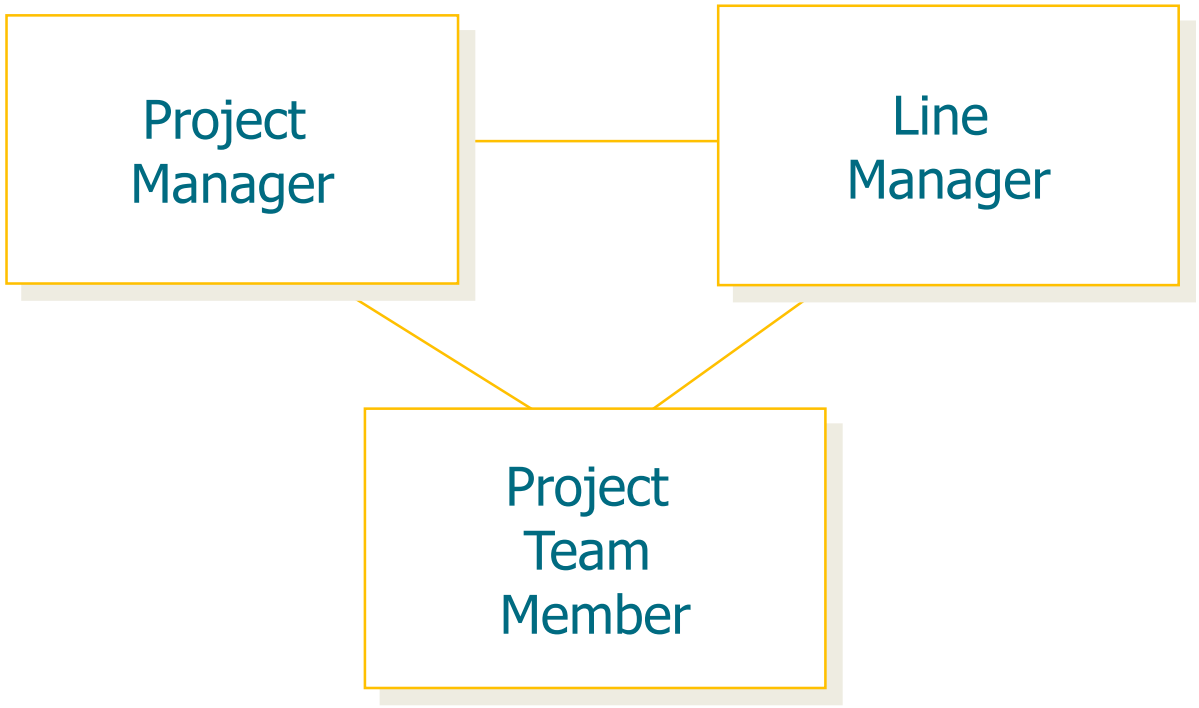
- Complete depiction of all needed project resources and costs
- In order to have
  - An appropriate basis for project decisions
  - A basis for evaluating project success
- If structured according to the WBS, there exists more transparency in project controlling

Project Organisation

Elements of Project Organisation

- Project organisation chart
- Project roles
- Project communication structures
- Project responsibility matrix

Formal authorities in projects



Distribution of authorities

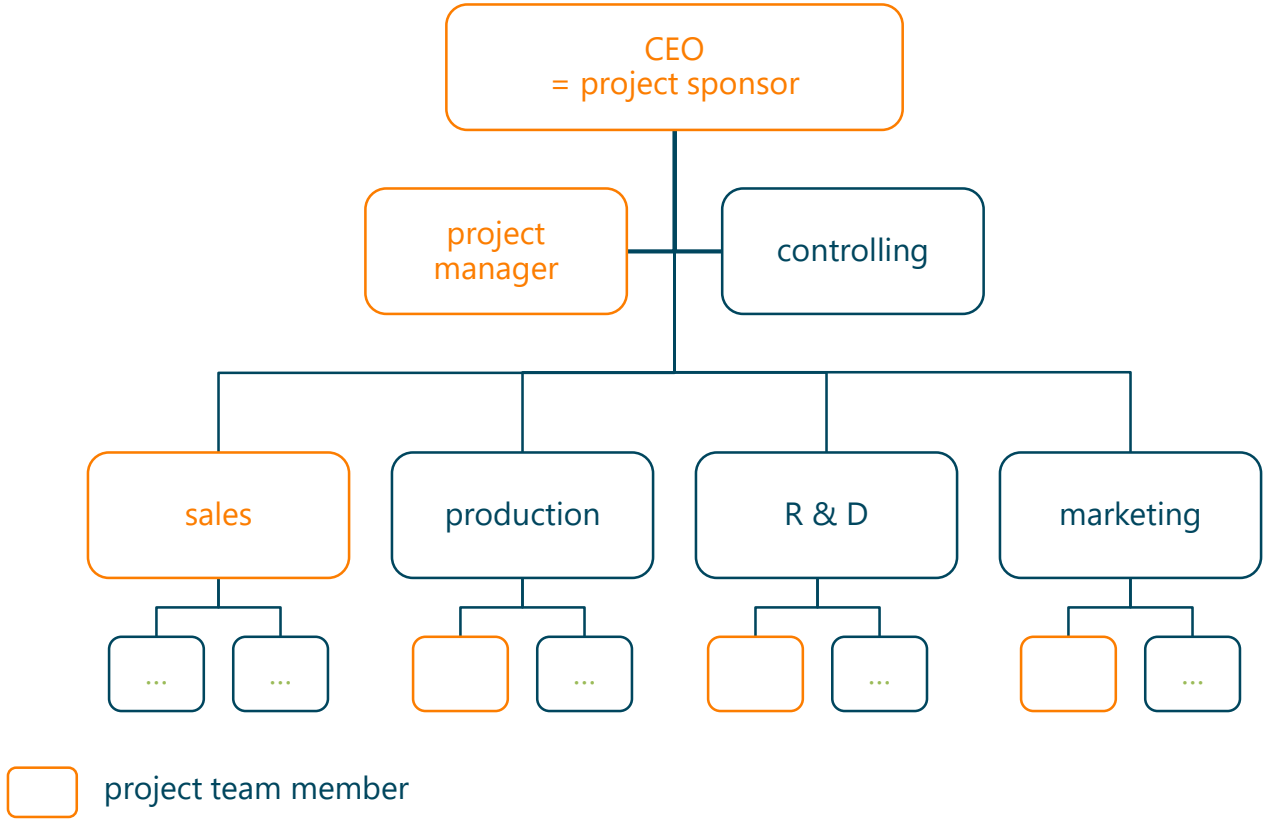
	Project Manager	Line Manager
What?	▲ ■	●
How well?	▲	■ ●
Who?	▲	■ ●
How?	▲	■ ●
How much?	▲ ■	●
When?	▲ ■	●

▲ Pure-line Project Organization

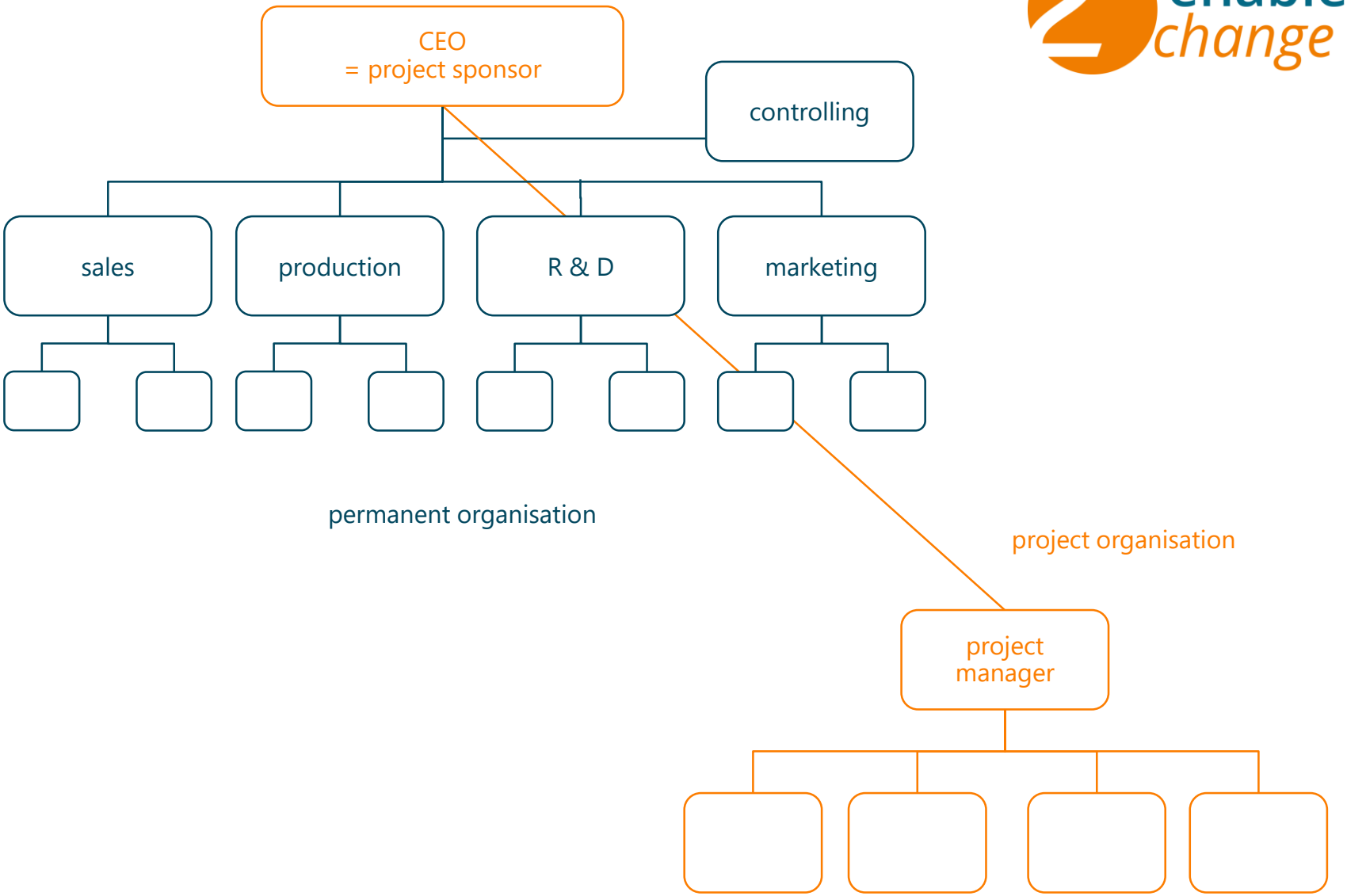
■ Matrix-Project-Organization

● Influence Project-Organization

Projects are embedded in an organisational context

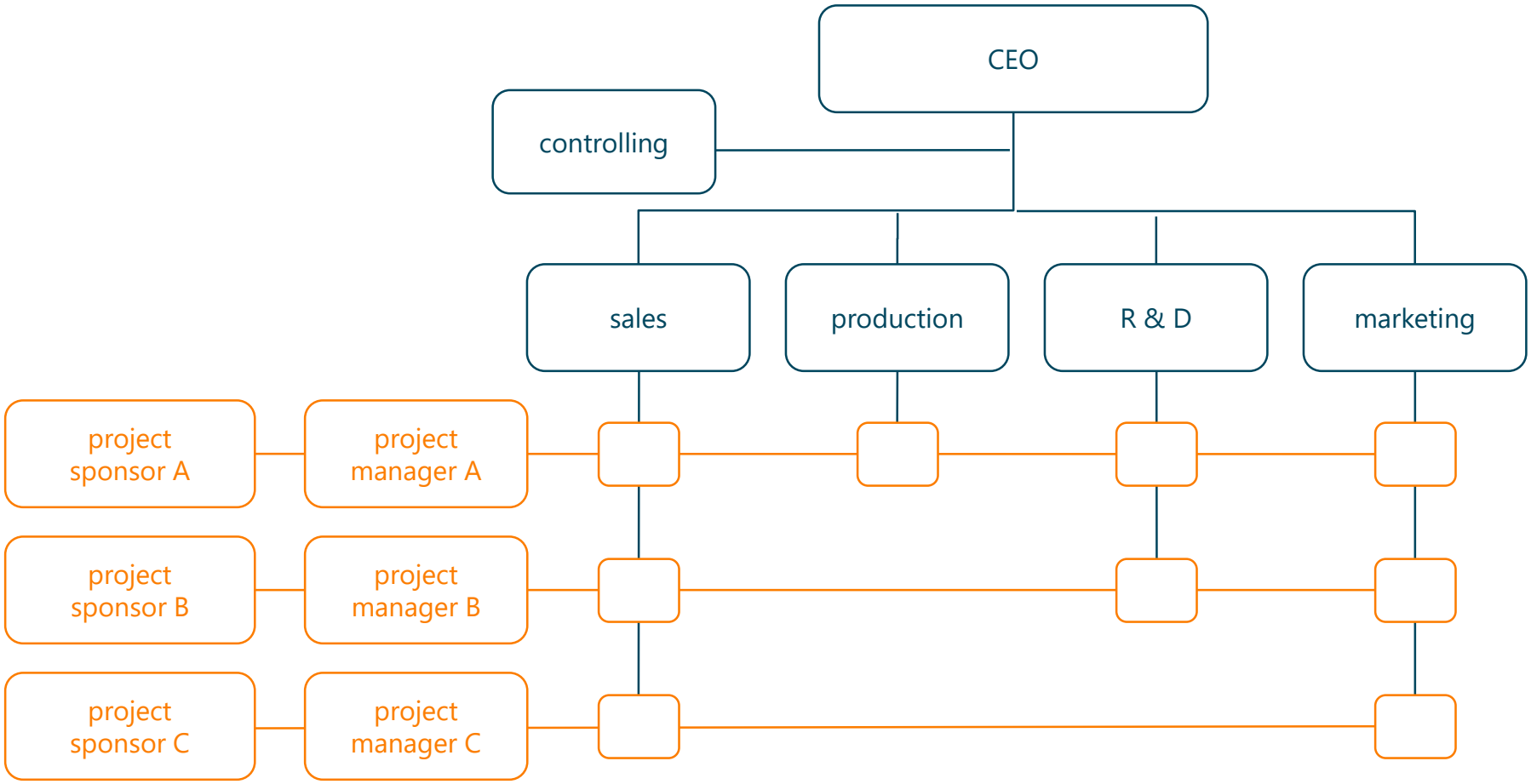


(Gareis, 2005:71)



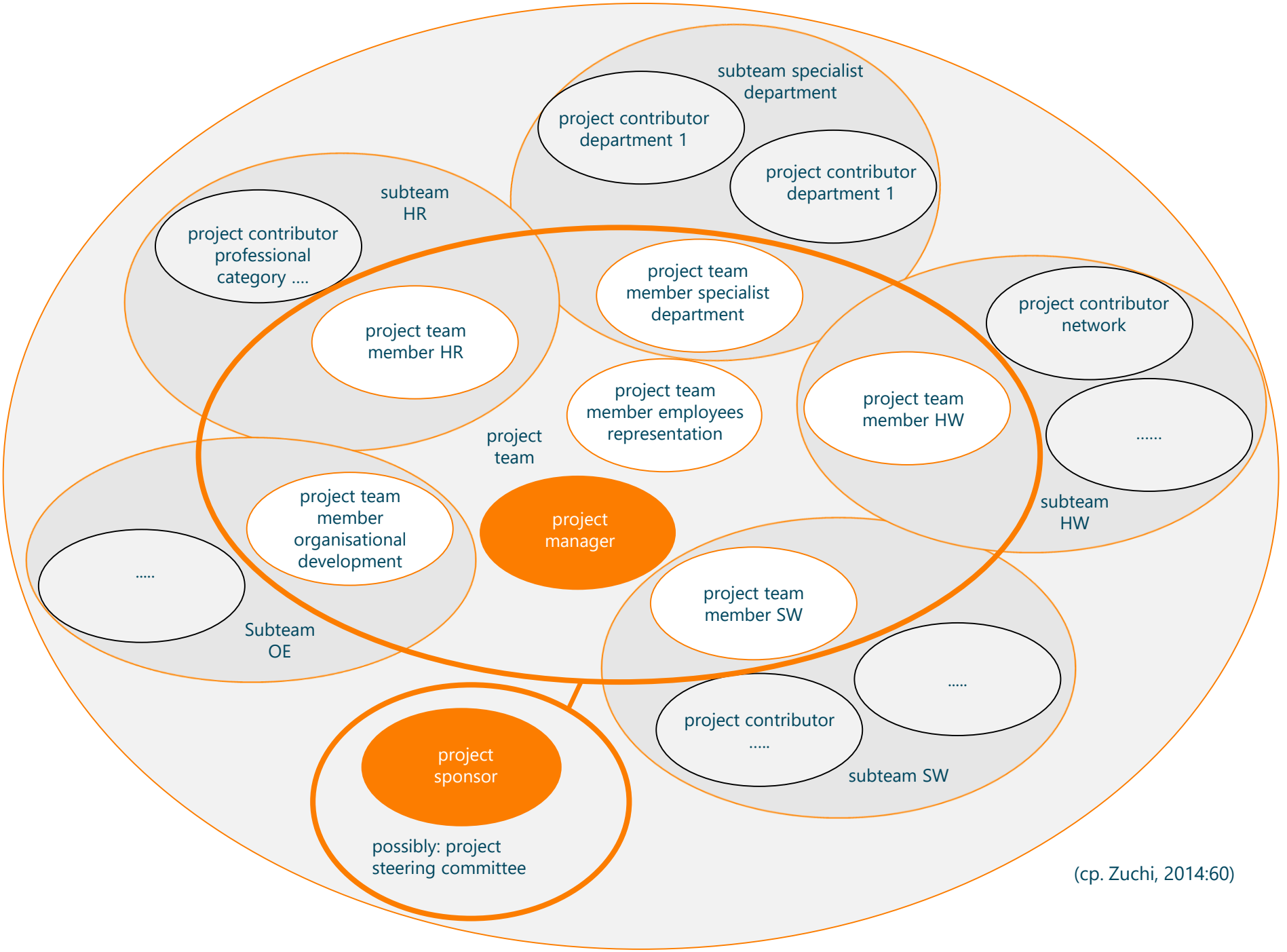
(Gareis, 2005:72)

Pure Project Organisation



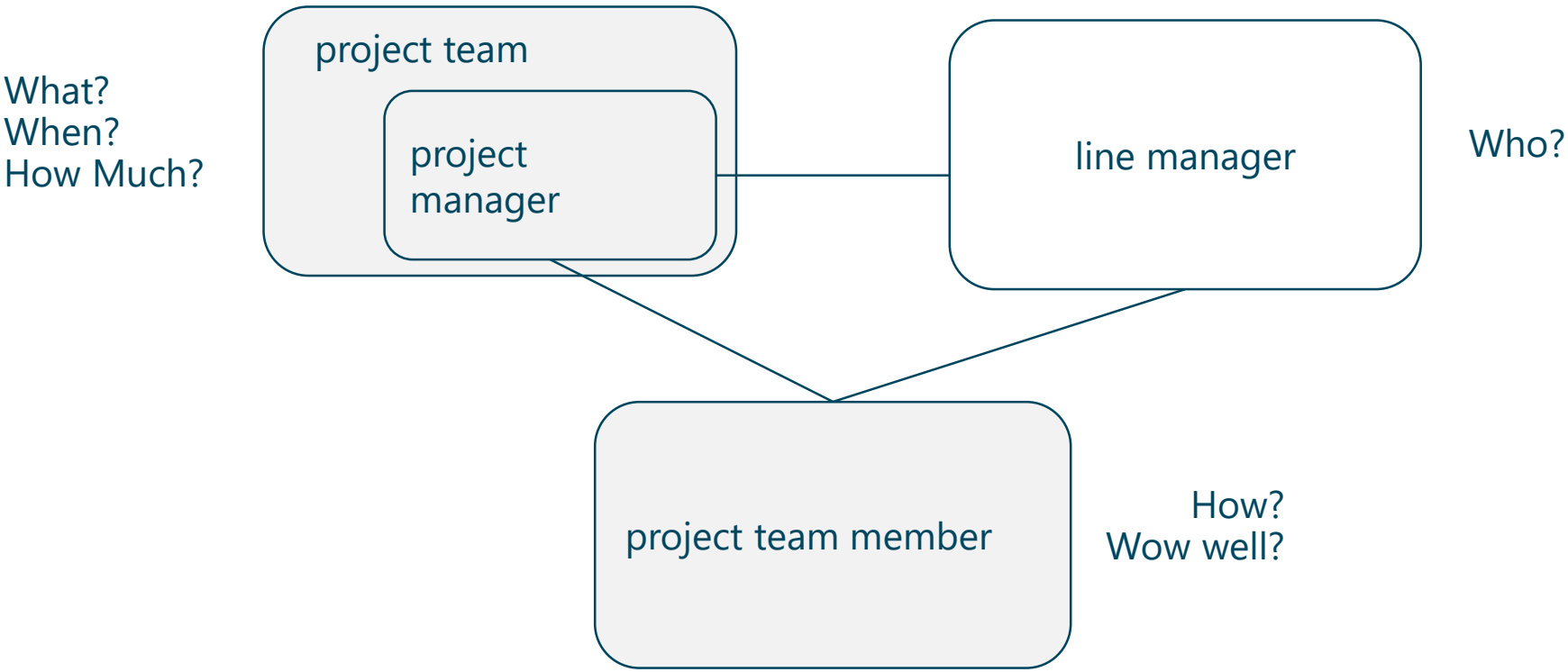
(Gareis, 2005:73)

Matrix Project Organisation



(cp. Zuchi, 2014:60)

Empowerment



Project Communication Structures

meeting	contents	participants	frequency
project start workshop	information on the project status, big project picture, project planning, decisions	project sponsor (partly), project manager, project team member	once, 1-1,5 days
project sponsor meeting	project status and project preview, issues and risks, necessary decisions	project sponsor, project manager, selected project team member (if appropriate)	according to project length and complexity: every 4th-5th week
project team meeting (controlling-workshop)	project status and project preview, issues and risks, agreements and decisions	project manager, all project team member, possibly selected external stakeholders	according to project length and complexity: every 4th-5th week, and when needed
subteam meetings	subteam related contents (status, problem solving)	subteam members, (if appropriate) PM and/or selected external stakeholders	when needed
project close down workshop	reflection, feedback, agreements on open to dos in the project and for the post project phase	project manager, all project team member	once, 0,5-1 days

(Gareis, 2006:294)

Projekt Responsibility Matrix

		Project sponsor	Project manager	Project team member A	Project team member B	Project team member C	…
WBS code	phase / work package						
1.1	project management						
1.1.1	project start	D	R	M	M	M	
1.1.2	project coordination		R	M	M	M	
…	…						

- Possible functions: R .. responsibility, C .. co-operation, D .. decision, I .. information
- RACI Matrix (responsible, accountable, consult, inform)

Project Organisation: Best Practice

- Clearly defined functional roles
  (representatives of business units/companies versus needed expertise)
- Empowerment (as the company culture allows it)
  - Decisions regarding personnel (who?) => line manager
  - Decisions regarding PM (what? how much? when?) => PM together with the project team members
  - Decisions regarding the content (how? how well?) => experts
- Integration of all roles (and persons)
  - Project view versus invester/supplier view
- Clear orientation for planned communications (event driven leadership)
- Distinct allocations of functions (as basis for detailed resource estimations)
- (Adequat) cultural elements for developing a common identity

Project Culture

Elements of Project Culture

- The project culture can be defined as the project values, norms and rules
- Methods for developing project culture
  - project mission statement
  - project name, project logo, project colour
  - project slogan
  - Project glossary
  - project-specific "social" events
  - project-specific rules (minutes, being late in meetings, substitutions in meetings)

(pm baseline, 2009:25)

Project Management as Process

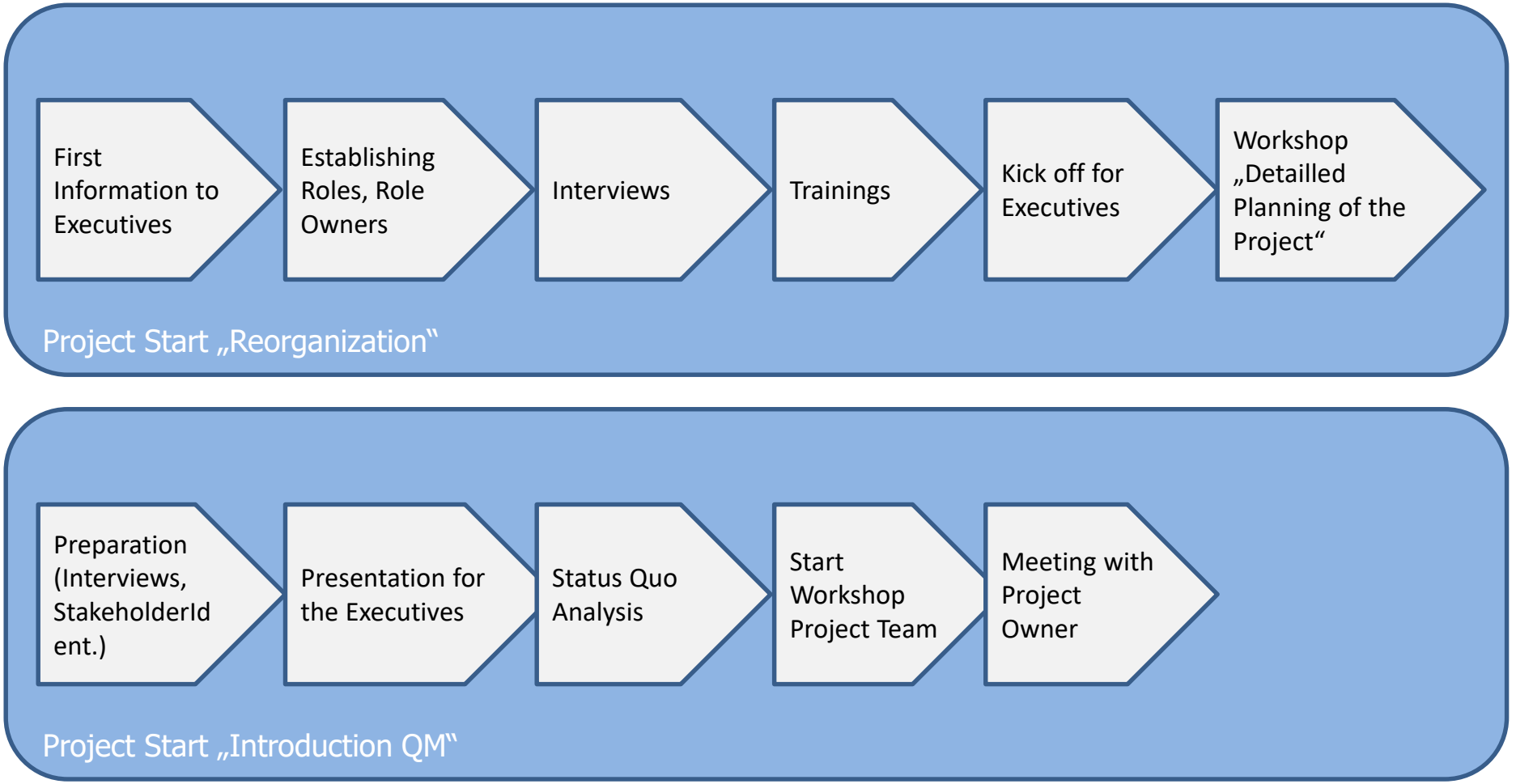
Project Start: Challenges

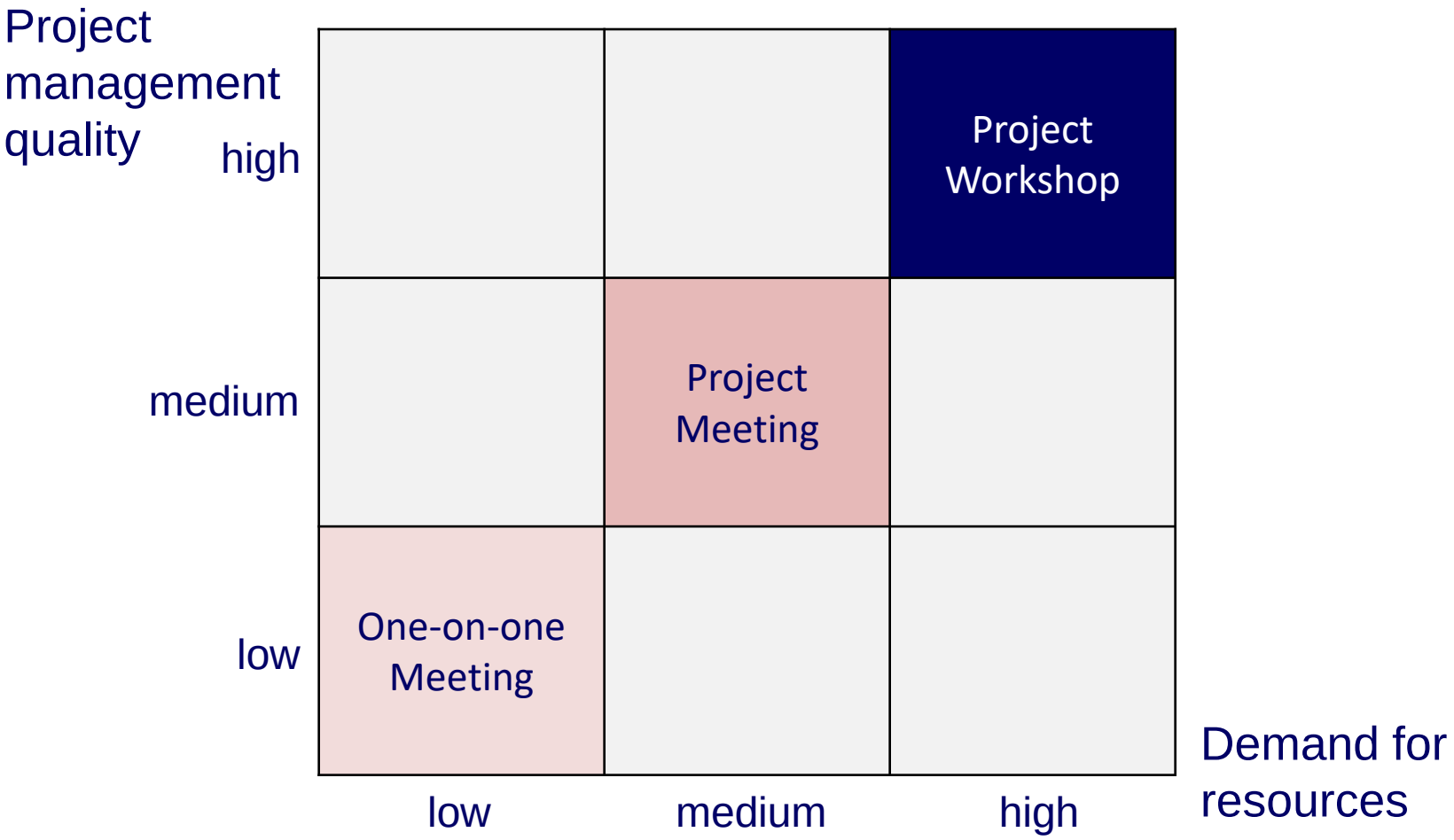
- No project assignment
- Different understandings by the project owner/sponsor(s) and the project manager
- Different level of information of the participants
- Time pressure, high demand for starting the work
- No acceptance for “long” planning
- Social insecurity, people do not know each other (in their new roles)
- Demand for orientation for everybody, even if not transparent

Project Start: Objectives

- Communication of the „big project picture“ to all members of the project organisation
- Information transfer from the pre-project phase into the project
- Development of adequate project plans
- Design of the project organisation, team building
- Development of a project culture
- Initial project marketing
- Definition of the structures for project controlling and project close-down

source: Happy Projects!, 2005, page 141


First Information to Executives
Establishing Roles, Role Owners
Interviews
Trainings
Kick off for Executives
Workshop „Detailled Planning of the Project“
Project Start „Reorganization“
Preparation (Interviews, StakeholderIdent.)
Presentation for the Executives
Status Quo Analysis
Start Workshop Project Team
Meeting with Project Owner
Project Start „Introduction QM“



source: Happy Projects!, 2005, page 190

- One-on-one meetings (fex for interviews)
- Project start workshop(s)
- Project start meeting(s) (with relevant stakeholders)
- Project owner/sponsor meeting
- Presentation(s), marketing activities
- Special workshops (e.g. Risk workshop(s)
- Written communication activities

Project Start: Teambuilding

Project Start: Teambuilding

Methods for the project start	small projects	projects
methods of project planning		
project scope		
• project objectives plan	must	must
• project objects of consideration	can	must
• work breakdown structure	must	must
• work package specifications	can	must
project schedules		
• project milestone plan	must	must
• project bar chart	can	must
• CPM schedule	can	can
project resources, project costs and project income		
• project resource plan	can	can
• project cost plan	must	must
• project income plan	can	can

source: Happy Projects!, 2005, page 199

Example: Project Start Workshop

Time	Topic	Working Form, Results	Preparation	Responsible
Day 1				
9.30 – 10-20	Welcome Importance Start workshop Objectives, Agenda Rules of the workshop Get to Know	Plenary	Flips: Objectives, Agenda, Rules	Project coach, Project manager, all
10.20 – 10.40	Project Fundamental Data: Contract scope Calculation Important contract clauses Details customer, location, etc.	Presentation plenary questions plenary	Handouts	Project manager, all
10.40 – 11.00	Break			
11.00 – 13.00	Boundaries and Context: Objectives, non-objectives Pre- and post project phase Other projects Project stakeholders Strategies	Creation plenary	Flips: Objectives, stakeholders, pre- and post project phase	Projekt coach, all
13.00 – 14.20	Lunch Break			
14.20 – 16.00	Calculation (details) Risk analysis Commercial & PM specialties Measurements	Presentation plenary Discussion plenary	Contract Calculation Risk analysis from offer phase	Commercial PM, offer PM
16.00 – 16.20	Break			

Example: Project Start Workshop

16.00 – 16.20	Break			
16.20 – 18.20	Technical overall concept: Scope detailed Limits, exclusions Specialties (norms, …) Interfaces to other contractors	Presentation plenary Discussion plenary	Flow diagrams, Layouts, technical docs from offer	Technical PM, Technical PM offer, Technical coach
18.20 – 19.20	Break			
19.20 - …	Project planning: Deliverables Procurement concept	Creation plenary	Draft Deliverables, Draft procurement concept	Project coach, Project manager, all
Day 2				
8.30 – 9.00	Reflection	Individually, plenary	Flip Reflection	Project coach, all
9.00 – 10.00	Project planning: WBS	Creation plenary	Draft WBS	Project coach, Project manager, all
10.00 – 10.20	Break			
10.20 – 12.20	1) Project planning: Work packages 2) Project organisation: Roles Employees Communication	Creation in 2 groups presentation, amendments plenary	Roles see PM-Guidelines Samples other projects, drafts	Groups per topics
12.20 – 13.40	Lunch Break			

Example: Project Start Workshop

12.20 – 13.40	Lunch Break			
13.40 – 15.40	1) Project planning: Scheduling 2) Project organisation: Responsibility Matrix	Creation in 2 groups presentation, amendments plenary	Samples other projects, drafts	Groups per topics
15.40 – 16.00	Break			
16.00 – 18.00	1) Project planning: Resource planning 2) Project organisation: Project documentation Logo Project rules	Creation in 2 groups presentation, amendments plenary	Samples other projects, drafts	Groups per topics
18.00 – 19.30	Integration, Summary, Cross check Agreement next steps Reflection Closing	Open items list, Assignment plenary	Results	Project coach, Project manager all
19.30 - …	Dinner			

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