

Projects made Simple



From Possibility...

Do you know how many projects are running in your department, or organisation, at the moment?

Do you even have an agreed definition of what a project is?

How many projects are killed by you after an initial feasibility study?

How many project reviews did you conduct in the last year to assess the effectiveness of your change management process?

For one of our clients, a County Council, one Directorate's answers to these questions were typical of many organisations – everyone was busy, more work kept arriving in the in-tray, but it was difficult to track who was doing what, whether it was going to plan or not, and how all these different activities fitted together.

Some staff had been trained in the PRINCE2 methodology and, although this had proved valuable on a major IT project, there was a general recognition that this was too complex and time-consuming for the majority of their projects.

Ad Esse were asked to work with the Directorate because they had seen an example of our project management approach that was aligned to PRINCE2, and used some of the same major decision points, but had a much simpler set of procedures and documentation. We were asked to train commissioners and managers of projects to ensure that all projects were managed in a consistent and transparent way.

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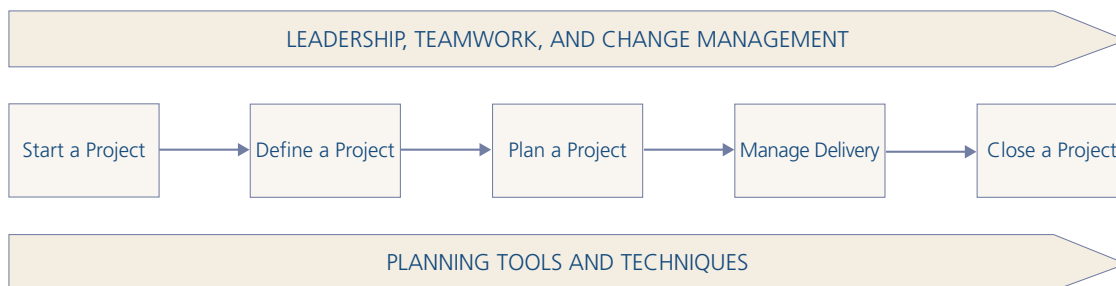
We also know that good project management training alone is insufficient. There has to be a planned introduction of project management principles and process. Senior managers, project managers and project team members all have to understand their roles and there has to be an effective process to ensure that projects are identified, selected, managed, closed and reviewed effectively.

Like at many of our clients, what was required was a simple, but effective, project management approach. It had to be practical and easy to implement but also “fit” with the PRINCE2 approach.

OUR APPROACH

The 5 stage Project Approach, developed by Ad Esse, met these needs. Like most project management approaches it places the emphasis on the definition and planning of a project. This is on the basis that most projects fail because the project objectives are misunderstood, or because the resource implications of the project are not agreed at the start, so the project is starved of resource, or money.

Our approach is summarised in the diagram below:



This approach covers the full project lifecycle from the capture of initial ideas, identifying the need for a change, to completion, learning and review. We believe that it is vital that leadership, teamwork and change management are applied throughout the process to ensure success. It is also essential that people have the ability to lead and sponsor projects, applying the right tools and techniques at the right time.

To Actuality...

THE INTRODUCTION OF A PROJECT MANAGEMENT SOLUTION

The work with the Directorate progressed in three distinct phases.

The first was to assess what approach would suit the Directorate and to design a project management process that would fit with their culture. This meant clarifying a number of items:

- Who could suggest projects and how they would be logged,
- Who could approve projects and what happened to those stopped at the assessment stages,
- Who should sponsor the projects and what the sponsor's role entailed,
- Who should manage the projects and what skills and capabilities they needed.

We also helped design a method of tracking projects and ensuring that milestones were recorded and progress against the milestones could be measured.



TRACKING PROJECTS AND PROJECT PROGRESS

It is easy to over-complicate the tracking of projects. Vast software tools can communicate all elements of a project's progress to all and sundry, but in reality few organisations need a complex tool to track project progress.

All projects should have a Project Manager and all projects should have an Owner. Their primary responsibility is to ensure that the project is meeting its milestones and achieving the result sought. A tracking and reporting tool is only needed to add to these roles, not to replace them.

We developed a simple tool based on Excel and Word to track project progress and achievement. Each project is given a line in an Excel spreadsheet, with the basic milestones recorded. Project Managers update progress on the spreadsheet and a simple RAG (red, amber, green) colour-coding is used to indicate performance. Project titles are hyperlinked to a Word document showing the project definition sheet. This allows users to check what the objectives of a project are, if the one-line description is insufficient.

A monthly review meeting checks on the status of key projects, focusing on those highlighted in red on the spreadsheet.

SENIOR MANAGEMENT AWARENESS

The second phase of introducing the project management approach was to brief senior managers and get them both on-board and starting to use the project management tools. Managers committed to spend a day developing the Directorate's approach to projects.

The senior management day consisted of a half-day explaining the project management process and managers' roles within it and a half-day on a 'project trawl'. The aim of the project trawl was to gather data on all the changes being managed within the Directorate that should be categorised as 'projects'. As senior managers reviewed business plans, departmental plans and meeting minutes it was realised that the Directorate had over 100 live projects underway, or due to be underway within the next month. Some staff had over 10 projects where they were nominally project managers, but the reality was that some were in progress, some were stalled and some had never really left the starting line.

This list was whittled down to produce a number of priority changes that would become the first projects to be managed by a nominated Project Manager, using the new project management approach.

IDENTIFYING PRIORITIES AMONGST 100 PROJECTS

The whittling down process can be an interesting one in any organisation. If 100 projects have been launched in some way, then obviously someone thought that they were a good idea at the time. Reducing the number is about applying real world thinking.

*The issue in the real world is not 'is it a good idea?', but
"Is it a better idea than the other things we are already working on?"*

In the same way, identifying the projects to tackle with the introduction of a new project management approach depends upon two things, the number of projects that can be managed effectively, and the relative priority of the different projects.

In the Directorate workshop, managers used the Ranking and Rating technique to rate each project in turn for its impact on customers, impact on internal performance, impact on stakeholders and use of internal resource. A clear list of priorities was identified and projects were selected from the top of the list in priority order until it was clear that Project Managers were 'full'.

Those changes not picked as projects were either parked for later action when resources were available, killed once and for all, or taken away for further analysis.





PROJECT MANAGER TRAINING

The third phase was to train the Project Managers. Training materials were developed from the 5 stage approach with the inclusion of a Council-based case study, customised documentation and specific terminology to provide a relevant and applicable resource. The proposed approach and methodology was agreed with senior managers.

The training was completed in two days, with much time spent on the practical application of the project management tools built around the case study. The training was very well received and felt to be pitched at just the right level for the majority of projects.

USING THE PROCESS

The Directorate now has a project management structure, a way of tracking project objectives and progress and a common terminology across both project commissioners and project managers. Changes are initiated in a controlled way, with clear objectives and a clear methodology throughout. Project managers have a set of practical tools that they can apply at each stage of the project, and senior managers have the visibility of which projects are key to the delivery of their department's objectives.

As an organisation, you need effective project management. In an age where efficiency is not an ideal but is demanded by all, you cannot afford to have "ongoing" projects, but require effective delivery.



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