

Section Five

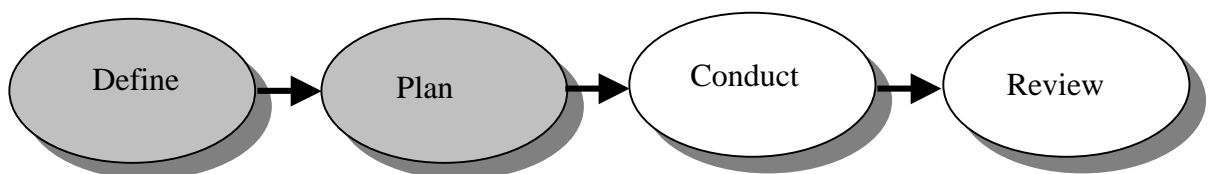
Learning Module D: Conducting and Reviewing the Project

5.1 Module D: Objectives

At the conclusion of this module you will be able to:

- implement a project plan;
- keep control of a project plan;
- effectively review a project.

5.2 Content of Module



This module concludes the project management life cycle. You will learn about the **Conduct** and **Review** phase. You will also explore the issues of project control and identify what should be included in a project review.

5.3 Overview

After all this project planning, we now have to actually do something! Conducting the project is normally the longest phase of the project management cycle. It follows on from a good project plan. The quality of the project plan is usually a good predictor of how your project will run. This does not mean that an effective, realistic plan guarantees smooth sailing. In fact it may be anything but that. What an effective project plan should mean is that the project manager has enough information at hand to be able to maintain control of the project in spite of the turbulence thrown up by the real world.

A classic story to illustrate this is the tale of the Apollo 11 space journey. During the entire journey to the moon, it has been said that Apollo 11 was only ever on track for 2% of the time. Does this mean that they were lost most of the time? Obviously not. The computer guidance systems were always in total control, making constant adjustments to ensure that Apollo 11 remained on course. So too in project management, you may not always be on track, BUT you should have enough information in front of you to make constant adjustments, enabling you to maintain control and keep on course.



Exercise Six

Consider the project plan for our *Simple University Research Project*. Let us assume you are comfortable with the quality of your plan. You are now ready to undertake the project. Before you start, there are a number of issues associated with control which you should consider. *You may wish to write down your thoughts on this before reading on. Please note that you should only spend about 5 to 10 minutes on this exercise.*



Question 1

What do you need to do throughout your project to ensure that you maintain control?



Question 2

How are you going to communicate?



Question 3

How will you know you are behind or ahead in project progress?



Question 4

How do you actually ensure you achieve what you say you will?

During workshops when participants have been asked this question, their responses have included:

- Conduct regular meetings of the project team.
- Establish milestones and deadlines so that the project manager can tell when the plan is not proceeding according to schedule.
- Update the progress of the project and the milestones on a regular basis.
- Acknowledge accomplishments within the project both formally and informally (social activities etc).
- Identify champions of the project who will sell the project and its outcomes.
- Establish a communications system – meetings, faxes, email etc.
- Use program management software.



All these ideas are valid. The key to success is to turn these ideas into a process. This process can be broken into three areas:

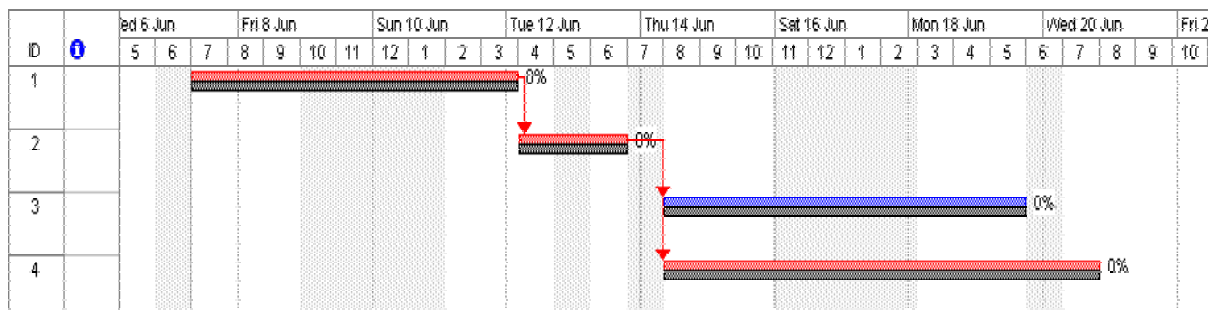
- **set-up**
- **monitor and**
- **control.**

5.4 Set-up

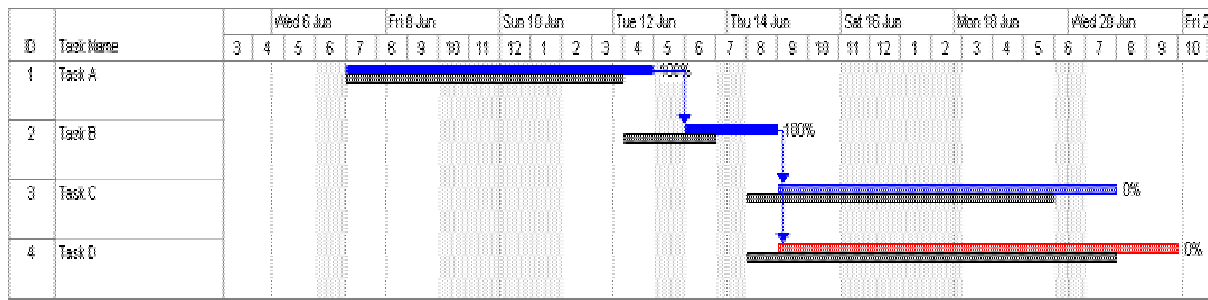
Once you have your plan in place you need to ensure that it is workable and has a chance of succeeding. You should establish a baseline, organise the project team infrastructure and set your team guidelines.

Baseline

The baseline (or baseline plan) is the initial approved plan to which deviations will be compared. A common use of the baseline plan is to display it on a Gantt chart, along with the current or expected schedule values. This provides a graphic representation of this comparison. If you use a software program like MS-Project, the baseline appears as a grey line on your Gantt chart as shown in the diagram below.



Note the simple project above the dark baseline underneath the Gantt chart. When there is a delay in a task as in diagram on the next page, the task may move but the baseline remains fixed.



Project Infrastructure

With your plan firmly established, the project infrastructure needs to be addressed. Project infrastructure includes practical considerations such as the physical location of the project team, cost account codes, passwords and establishment of a web page. It is the myriad of administrative details necessary to ensure effective and smooth conduct of the project.

Establishment of the Project Team

The final and most important consideration is the establishment of the team. The start of the implementation phase offers another opportunity to harness the benefits that accrue from good team building and bonding. It is not uncommon for teams to form around a project and then, as it nears its end, to dissolve and reform around new ones as they start up. It will be important for team members to get to know each other. Effective team briefings, meetings and communication plans are vital to project success. **We will address team issues in Section Six.**

5.5 Monitoring

Monitoring is sometimes referred to as monitoring and tracking. It is essentially asking questions about the progress of the project, the use of resources, the completion of tasks and subtasks etc and recording the information from these questions in your project management information system. Monitoring is about checking on the status of a project and recording information in such a way that decisions can be made from the information.

It does not matter how detailed or sophisticated your plan is, it is after all, just a statement of what you want to happen. As the project progresses, you may deviate from your original intentions. This interaction between what is planned and what actually happens and how you manage this, is what will ultimately determine the success of the project.

The progress is recorded as ‘actuals’; in other words the actual work that is being undertaken. It is normal to choose a standard reporting period, for example every second Friday. This reporting period is determined by the duration of the project, the number and frequency of milestones and the level of critical tasks. Thus for a short project of say three to six months, it may be weekly but for a longer project of a year or more, it may be monthly.

At each reporting period we want to know the following:

- Actual completion dates (when did people start and finish?)
- Actual effort (how many hours of work were expended?)
- Actual cost (how many dollars were expended?)
- Actual progress (how far along has the work advanced?)
- Problems (what unexpected problems or issues have arisen?)
- Projections (what is the current completion and expenditure forecast?)

The 'actuals' can be gathered in a number of ways. You may choose to have team members report progress on their particular tasks at team meetings. Alternatively, they may report to you directly (e.g. fortnightly email progress). MS-Project has an on-line facility that allows project managers to update their 'actuals' from the net.

Monitoring implies that the values are recorded and reviewed over a period of time. This is the only way that trends can be detected and problems headed off before they impair the progress of the project. Of course, in teaching and learning projects, the monitoring process can be quite simple. For instance you may just set a series of milestones and monitor how you progress towards them.



Remember, the key is for you to have enough information to be able to maintain control.

5.6 Control

Control means exactly that, CONTROL; you have enough information to make appropriate decisions. How you use the reports and information will affect the end results of your project. Here are some tips to help you maintain control.

- Use your project plan as the primary guide for co-ordinating your project.
- Monitor and update your plan regularly.
- Document progress and changes.
- Conduct efficient and effective meetings.
- Remember the only reason you have a project plan is so you can get out and **do the work. Never lose sight of the fact that the plan is designed to make life easier for you – not 'bog you down' in paperwork.**

Ultimately, it all comes down to the control stage. In other words, the decisions you make as you progress through your project are what determine your success. All we have done up to now is set you up with enough information to make the right decisions.

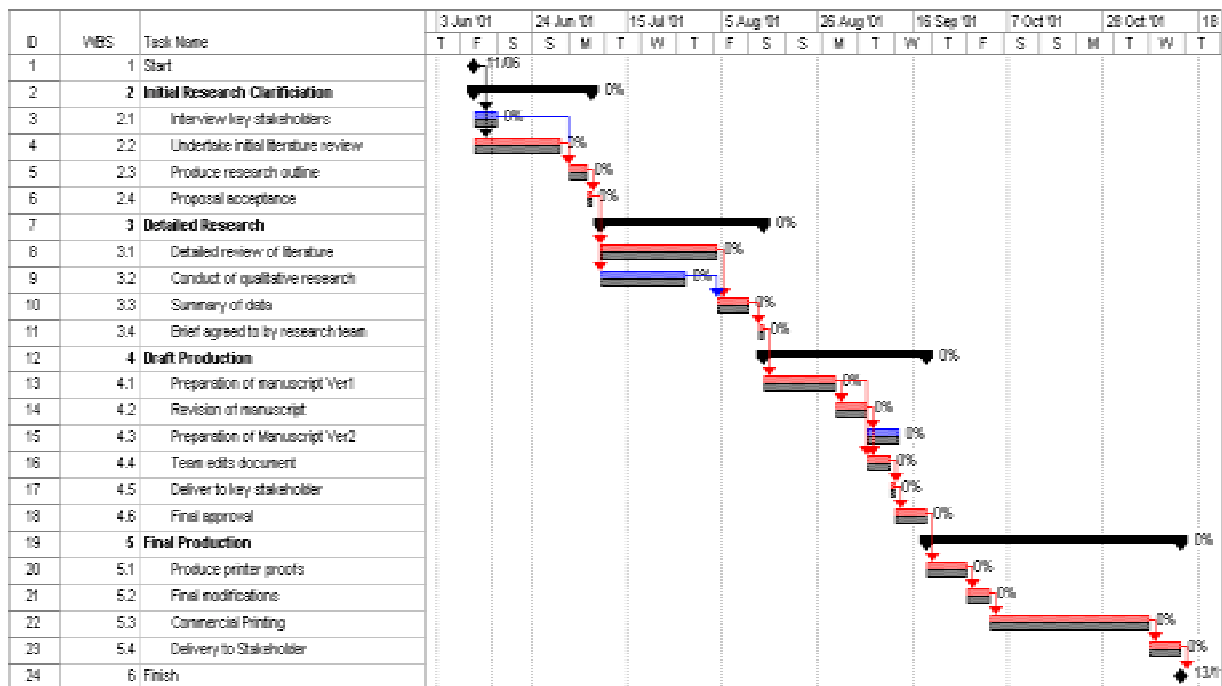
From a project planning perspective there are only a few things you can really do at any given time to maintain control.

- Extend the duration of a task.
- Add resources to a task (either current or future).
- Overlap tasks (revise or remove the predecessor link).
- Re-scope the project.
- Re-negotiate the end date with the owner.
- Increase resource productivity.
- Do nothing!

In the final section of this manual, we have included a number of case studies from the projects conducted at UNE. These will provide examples of the type of “control” decisions which are made by other project managers and the timings of these decisions. These will give you some insights into what decisions you may have to make and when it may be necessary for you to make them.

5.7 Your Project Management Information System

Below we have combined your Project Management Information System. Notice the Gantt chart with the baseline in dark and the actual Gantt bars with % complete.



Underneath is a list of available resources and their cost.

ID	Resource Name	Type	Material Label	Initials	Group	Max. Units	Std. Rate	Ovt. Rate	Cost/Use	Accrue At	Base Calendar	Cc
1	Bill	Work		B		1	\$28.00/hr	\$0.00/hr	\$0.00	Prorated	Standard	
2	Jenny	Work		J		1	\$28.00/hr	\$0.00/hr	\$0.00	Prorated	Standard	
3	Susie	Work		S		1	\$28.00/hr	\$0.00/hr	\$0.00	Prorated	Standard	
4	Project Manager	Work		P		1	\$40.00/hr	\$0.00/hr	\$0.00	Prorated	Standard	
5	Printer	Work		P		1	\$0.00/hr	\$0.00/hr	\$0.00	Prorated	Standard	

At a quick glance you can quickly see the entire project. Below is a snapshot of one week for one of the resources (Bill). It shows the baseline costs and planned work. As the project progresses “actuals” can be filled in and at any given time you can see the plan versus the actual time, workload and costs.

ID	Resource Name	Cost	Baseline Cost	Variance	Details	M	T	W	T	F
						8h	8h	8h	8h	8h
1	Bill	\$10,416.00	\$10,416.00	\$0.00	Work					
					Act. Wk					
					Cost	\$224.00	\$224.00	\$224.00	\$224.00	\$224.00
	<i>Interview key stakeholders</i>	\$560.00	\$560.00	\$0.00	Work					
					Act. Wk					
					Cost					
	<i>Undertake initial literature review</i>	\$1,680.00	\$1,680.00	\$0.00	Work					
					Act. Wk					
					Cost					
	<i>Produce research outline</i>	\$448.00	\$448.00	\$0.00	Work					
					Act. Wk					
					Cost					
	<i>Detailed review of literature</i>	\$2,240.00	\$2,240.00	\$0.00	Work					
					Act. Wk					
					Cost					
	<i>Brief agreed to by research team</i>	\$112.00	\$112.00	\$0.00	Work					
					Act. Wk					
					Cost					
	<i>Preparation of manuscript Ver1</i>	\$2,688.00	\$2,688.00	\$0.00	Work					
					Act. Wk					
					Cost					
	<i>Revision of manuscript</i>	\$1,120.00	\$1,120.00	\$0.00	Work	8h	8h	8h		
					Act. Wk					
					Cost	\$224.00	\$224.00	\$224.00		
	<i>Preparation of Manuscript Ver2</i>	\$560.00	\$560.00	\$0.00	Work				4h	4h
					Act. Wk					
					Cost				\$112.00	\$112.00
	<i>Team edits document</i>	\$336.00	\$336.00	\$0.00	Work				4h	4h
					Act. Wk					
					Cost				\$112.00	\$112.00
	<i>Final modifications</i>	\$672.00	\$672.00	\$0.00	Work					
					Act. Wk					
					Cost					

The charts included in this section were created using project management software. If you do not have such software, you can create these charts manually and still use them for your project management information system. We have included a Resources Usage and Gantt Chart form in Section Seven.

5.8 Productive Meetings

It seems strange to be talking about something as simple as a meeting. However meetings are such an integral part of project management. Our experience has been that they are often not conducted well. Participants undertaking the ‘Enhancing Project Management Program’ often complained about wasteful project meetings.

Yet, a meeting is an amazingly simple process. If managed correctly, a meeting can be a useful project management tool. There are a few simple steps which can be taken to ensure that a meeting is effective. You should always determine who has to be at the meeting; there is no requirement to have all team members at all meetings. It is important that a project meeting has an agenda and that the meeting follows this agenda. The meeting has been called for a number of reasons and if the discussion “wanders”, then some or all of the meeting objectives will not be achieved. (We have included two example meeting agendas in Section Seven for you to consider.) It is also important that minutes of a meeting are recorded and that these prescribe actions, where appropriate, to definite people to perform within defined times. There should also

be follow up action to ensure that the tasks are undertaken. We have included a list of hints for writing effective meeting minutes in Section Seven.

It is important that the project manager establishes the way he/she wants the meeting conducted. If you are definite and precise early on then it will be possible to relax further into the project. We probably all have experienced the frustration of poorly conducted and time wasteful meetings. For example:

- Attendees who arrive late
- Discussion which strays from the subject area
- Chairperson and/or attendees who are poorly prepared
- Questionable meeting effectiveness
- Poor listening skills
- Long duration
- Lack of participation



By following some simple rules, you can make sure you conduct efficient meetings.

- **Always plan your meetings and ALWAYS use an agenda.**
- **Always use a checklist (like the one provided by us!) for efficiency sake.**
- **Only invite people to a meeting who are totally essential to the planned outcome you desire.**

Remember that at meetings, people should be expected to give their full attention. It is up to the Chairperson to keep the conversation on track, precise and to the point.

DON'T LET YOUR MEETINGS TURN INTO TIME WASTERS.

It does not matter whether you are simply attending a meeting or organising one, always plan what you're going to do in the meeting, and most importantly, decide what YOU want to achieve from it. On the following pages we provide a simple meeting checklist and planner.



A MEETING CHECKLIST

BEFORE

CHAIRPERSON	ATTENDEES
<ul style="list-style-type: none">• Determine Objectives• Determine Participants• Prepare Agenda• Organise Meeting Place• Do any preparation required	<ul style="list-style-type: none">• Confirm Your Attendance• Decide what is required of you• Decide what you want from the meeting• Do any preparation required

DURING

CHAIRPERSON	ATTENDEES
<ul style="list-style-type: none">• Be punctual• Stick to the Agenda• Retain Control• Ask questions• Keep the meeting brief• Summarise results	<ul style="list-style-type: none">• Be punctual• Listen• Participate• Don't wander off the subject• Ask questions

AFTER

CHAIRPERSON	ATTENDEES
<ul style="list-style-type: none">• Assess your performance• Follow up promptly on any items you are required to action• Ensure others do the same	<ul style="list-style-type: none">• Assess your performance• Follow up promptly on any items you are required to action

5.9 The Review Phase

The final phase of the project management cycle is the evaluation or review. The purpose of the review is to appraise your performance during the project. Ask yourself what you did well and what needed to be improved upon. Only through an evaluation of your project can you learn from the process and improve the management of your next project. As the old saying goes “those who cannot remember the past are condemned to repeat it” (G Santayana, A Life of Reason (1905-06)).

A review is rarely planned for in teaching and learning projects. **The key to ensure one is undertaken is to include it in the project plan with a budget.** Reviewing a project should be quite straightforward. If you are clever the majority of work is done prior to the project completing. This is where project management software is vitally important. The use of the notes function in MS-Project coupled with judicious and timely saving of files, ensures a thorough record of the project is available at the end for very little effort. Alternatively, a simple journal will achieve the same result.

A carefully constructed review can provide a template for an even more successful project in the future. The review should cover **technical** performance of the project, such as how software performed, information availability etc. It should also include the **project management** issues. These include questions about the validity of your initial project definition, the accuracy of your estimation process and the effectiveness of your decision-making. The project review can provide not only a template for your next project but also substantial information relevant to your final report.

The Project Report

The inevitable final report is your final history of the project. In this manual we do not intend to discuss final reports in any detail. This is because the actual template for a report is often prescribed for you. This will depend on the type of grant or project you are undertaking (e.g. DETYA provides a report template for projects that it funds. For your information, we have included the prescribed project report format for this project as an example in Section Seven).



There are just two points we wish to make with regards to project reports. Firstly, effective project management is more likely to result in a favourable and on time report. Secondly, if you keep good records during your project, then the report is essentially done.

5.10 Why Projects Succeed

Listed over the page are a few reasons why projects succeed. This list includes our personal experience and also includes a list of pointers from such important project management texts as ‘The complete Idiots Guide to Project Management’ (incidentally we thoroughly recommend the ‘Idiots Guide’ as a no nonsense reference for the aspiring project manager).

NB: These are not in any particular order.

- 1. A realistic plan**
- 2. Clarity of goals**
- 3. Careful reporting and monitoring**
- 4. Strong and conscientious leadership**
- 5. Commitment from stakeholders**
- 6. Commitment from team members**
- 7. The right people in the right position**
- 8. Effective and meaningful use of the project management process**
- 9. Risk is recognised and managed**
- 10. Team work is taken seriously**

At the end of the day project management provides a system that should free you to get on with your work.

5.11 Module Summary

- The quality of the project plan is a good predictor of how smoothly the project will run.
- The key to the successful conduct of a project is set up, monitoring and control.
 - Setting up involves establishing a baseline, creating the project infrastructure and establishing the project team.
 - Monitoring involves comparing what was planned with what actually happened
 - Control involves gathering enough information to make appropriate decisions
- For effective meetings you should always plan your meetings and ALWAYS use an agenda; always use a checklist for efficiency sake and only invite people to a meeting who are totally essential to the planned outcome you desire
- The purpose of the review phase is to appraise the process and performance and to improve the management of the next project
- Ask the questions:
 - Am I in control?
 - What can I learn?