

The Secret Handshake of Project Management Methodology

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While most people are not formally skilled in Project Management Methodology, taking a role in a project team can be an excellent learning opportunity as well as enhancing a person's career profile, so it makes sense to have some knowledge of what is involved. Those of us employed in the learning and development sector are generally well situated for project work as learning and development requires us to have good people skills, negotiation skills and the ability to function well within a team.

Introduction

Around about this time last year, a colleague of mine was offered a position on a project team that was put together for the rollout and implementation of an organisation's portal. She was delighted and positive, but when she got to the first project team meeting she suddenly realised that her skills as a trainer were not all she needed in order to function in a purpose built project team that bantered around terms such as 'deliverables', 'risk control' and lived and died by something called the 'Project Definition Report'. Her lack of familiarity with project work made her feel ill-equipped to participate, despite her considerable skills. As a result, she excused herself from the project rather than risk losing her credibility because she didn't understand what she termed 'the secret handshake' of Project Management Methodology. L&D people are often offered positions on a project team as subject matter experts, advisors, or in other related capacities and to ensure their successful participation they need to be aware that there is specific methodology used to run most projects which has nothing to do with the L&D enterprise.

The purpose of this paper is to gain an understanding of the process of Project Management and to give a brief overview of the methodology that underpins most formally run projects, so that when the situation arises, L & D consultants and trainers have some knowledge of what is involved. The methodology outlined below is deliberately generic because these principles are universal and are then tailored according to the project and organisation. I would also like to point out that this article merely touches the tip of the iceberg of Project Management Methodology and I strongly urge anyone who is considering working in this framework to do some further study and reading on the subject.

What is a Project?

A project is a temporary and one-time exercise, which varies in duration. It is undertaken to address a specific need in an organisation, which this may be to create a product or service or to change a business process. This is in direct contrast to how an organisation generally works on a permanent basis to produce their goods or services. For example, the work of an organisation may be to manufacture trucks on a continual basis, therefore the work is considered

functional as the organisation creates the same products or services over-and-over again and people hold their roles on a semi permanent basis.

What is Project Management?

A project is generally initiated by a perceived need in an organisation. Being a one off undertaking, it will have a start and an end, constraints of budgets, time and resources and involves a purpose built team. Project teams can be made up of many different team members. For example, end users/customers (of a product or service), representatives from Information Technology (IT), a project leader, business analysts, trainers, the project sponsor and other stakeholders. Project management is the discipline of managing all the different resources and aspects of the project in such a way that the resources will deliver all the work output that is required to complete the project within the defined scope, time, and cost constraints. These are agreed upon in the project initiation stage and by the time the project begins all stakeholders and team members will have a clear understanding and acceptance of the process, methodology and expected outcomes. A good Project Manager utilises a formal process that can be audited and used as a blue print for the project, and this is achieved by employing a Project Management Methodology.

Project Management Methodology

Generally, projects are split into three phases: Initiation, Implementation and Closure. Each phase then has multiple checkpoints that must be met before the next phase begins. The degree to which a project is managed will depend on the size of the project. For a complex project in a large organisation that involves a number of people, resources, time and money, a more structured approach is needed, and there will be more steps built into each stage of the project to ensure that the project delivers the anticipated end result. For a simple project in a small organisation, agreed milestones, a few checklists and someone to co-ordinate the project may be all that is required.

Initiating a Project

All projects start with an idea for a product, service, new capability or other desired outcome. The idea is communicated to the project sponsors (the people who will fund the project) using what is called either a mandate or project charter. The mandate is a document structured in a way that lays out a clear method for proposing a project and should result in a business case for the project. Once the business case has been approved a more detailed document is prepared that explains the project and it is known as the 'The Project Definition Report' (PD).

The PD is not only used to provide detailed information on the project, but is the report on which an assessment is made as to whether the project should proceed or not. Some of the key areas it covers is the scope of the project, results of any feasibility studies, and what it is intended to deliver. As well this document will identify the key people involved, resources required, costs and expected duration as well as benefits to the business.

A project usually has a goal (the big picture) and this has to then be broken down into objectives you can use to measure whether you have achieved your aims. From this list you must then identify what is known as 'Key Success Criteria', and these are the objectives that are 'key' to the success or failure of the project – even if other objectives are met. These obviously vary from project to project.

Once the project has been given the go ahead, then a contract document is drawn up and the project sponsor uses this to give formal agreement to funding the project and for the project to begin. The initiation phase is then considered to be completed.

Implementing a Project

The implementation phase is about tracking and managing the project. The first thing that happens when the project begins is to use the Project Definition Report to create a project plan which defines how to perform what is detailed on the PD report. The PD is more of a summary of the project, so a detailed project plan must be created to fill in the fine detail of how the project will be run. The project plan is the central document that is used to manage the project for its duration so getting agreement and acceptance from all of the team on aspects such as the project milestones, phases and tasks, as well as who is responsible for each task, associated timelines and what deadlines are to be met.

Some of the stages in implementing a project are quality control, progress control, change control and risk management. The first aspect we will discuss is **risk management**, as once you have planned the project it is important to assess any factors that could have an impact upon it. 'Risk' in this case is considered to be anything that could negatively impact on the project meeting completion deadlines. For example losing team members due to illness or attrition, not having taken team members' annual leave into consideration, the possibility of having to retrain new team members, equipment not being delivered on time or contractors going out of business. A risk log is used to record and grade risks and carries an associated action plan to minimise the identified risk. Issues management is an associated area and refers to concerns related to the project raised by any stakeholder. This phase also involves the Project Manager in **quality control**, whereby regular reviews are made in formalised meetings to ensure the 'product' that is being produced by the project is reviewed against specific pre-defined standards.

Progress Control is another responsibility of the Project Manager and is the monitoring of the project and the production of regular progress reports to communicate the progress of the project to all stakeholders of the project. As most projects do not go exactly to plan, the process of progress control is to keep an eye on the direction of the project and monitor the degree to which the plan is followed and take appropriate action if stages are deviating from the plan by employing regular project tracking. This is achieved by having regular checkpoints during the course of the project that will have been established in the project definition. These meetings may be weekly and are used to monitor and control all that is going on with the project as well as capture statistics from each

project team member on actual start and finish dates for their allocated tasks as well as estimates for the next round of tasks.

By the nature of most projects never going exactly to plan, changes will need to be made to the length, direction and type of tasks carried out by the team. This has to be fully documented by the Project Manager in the form of 'change control'. **Change control** involves the Project Manager in documenting requests for change, identifying the impact on the project if the change is to be implemented (e.g. will it affect the finish time of the project, will the project run over budget, are there enough resources) and then informing all stakeholders of the implications and alternatives that the request for change has identified. The implementation phase ends once the project has achieved its goals and objectives as detailed by the key success criteria in the Project Definition Report.

Closing a Project

All projects are designed for a specific period of time and the process of project closure is an important aspect of project management. The purpose of a formal closedown to the project is to address all issues generated by the project, to release staff from the project and go through a 'lessons learnt' exercise.

At this stage a formal acceptance from the customer (the person for whom the process product has been created) is gained to indicate their sign-off on the project. This is generally done in the form of a customer acceptance form and is the formal acknowledgement from the customer that the project has ended. Once signed off, the project team is disbanded and no more work carried out.

However the project team will come together for what is called a Project Review Meeting, to formally end the project and go over any outstanding issues such as ongoing maintenance, the closing of project files and conduct a team review of the project. As a result a Project Closure Report is created to formalise how successfully the project has achieved its objectives, and how well the project has performed against its original business case, the scope, project plan, budget and allocated timeframes.

The Project Manager may also create a process improvement document that reviews the processes used by the project (e.g. what did we do well, what mistakes did we make) so that the organisation can learn from this project and make further projects more successful.

Because the project was run by a team of people who have spent a lot of time involved in the success of a particular piece of work, that has taken them out of their usual day-to-day activities it is considered important to hold some type of social closing event. This might be a dinner, drinks or some type of group activity where everyone can be recognised and rewarded for their efforts.

Summary

Many organisations do not employ full time Project Managers and it is common to pull together a project team to address a specific need, which means that opportunities will occur for L&D consultants to partake in work that may be out of their usual ambit of operation. While most people are not formally skilled in Project Methodology, taking a role in a project team can be an excellent learning opportunity and can enhance a person's career profile, so it makes sense to having a working knowledge of what is involved. Those people who are considering it as a career change, are about to be involved in a large project or have undertaken a major role on any project will need to know more about the process than the simple overview I have given. There is a multitude of information available on the mechanics and methodology of Project Management and references to some select texts are provided below.

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