

How to get started – managing a project



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Introduction

- This is a guide to managing a project, aimed at those who are new to project management
- It is based on PRINCE2® best practice guidance
- It provides an overview of the whole project lifecycle, outlining:
 - Step-by-step guide to actions and decisions
 - Outline of the documents needed to manage the project
- Identifies the key activities for starting the project
- Gives advice on the most common mistakes and how to overcome them

Download the [project management white paper](#)

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What is project management?

- Project management is the process by which projects are defined, planned, monitored, controlled and delivered such that the agreed benefits are realised. Projects are unique, transient endeavours undertaken to achieve a desired outcome. Projects bring about change and project management is recognised as the most efficient way of managing such change.

APM Body of Knowledge 5th edition

- Project management is a broad term used to describe the processes, organisational structure and decision making needed for the successful implementation of change. It requires a unique mix of technical ability (planning, risk analysis, change control) and people skills (listening, questioning, motivating, inspiring).

For more information: [Project Management Explained](#)

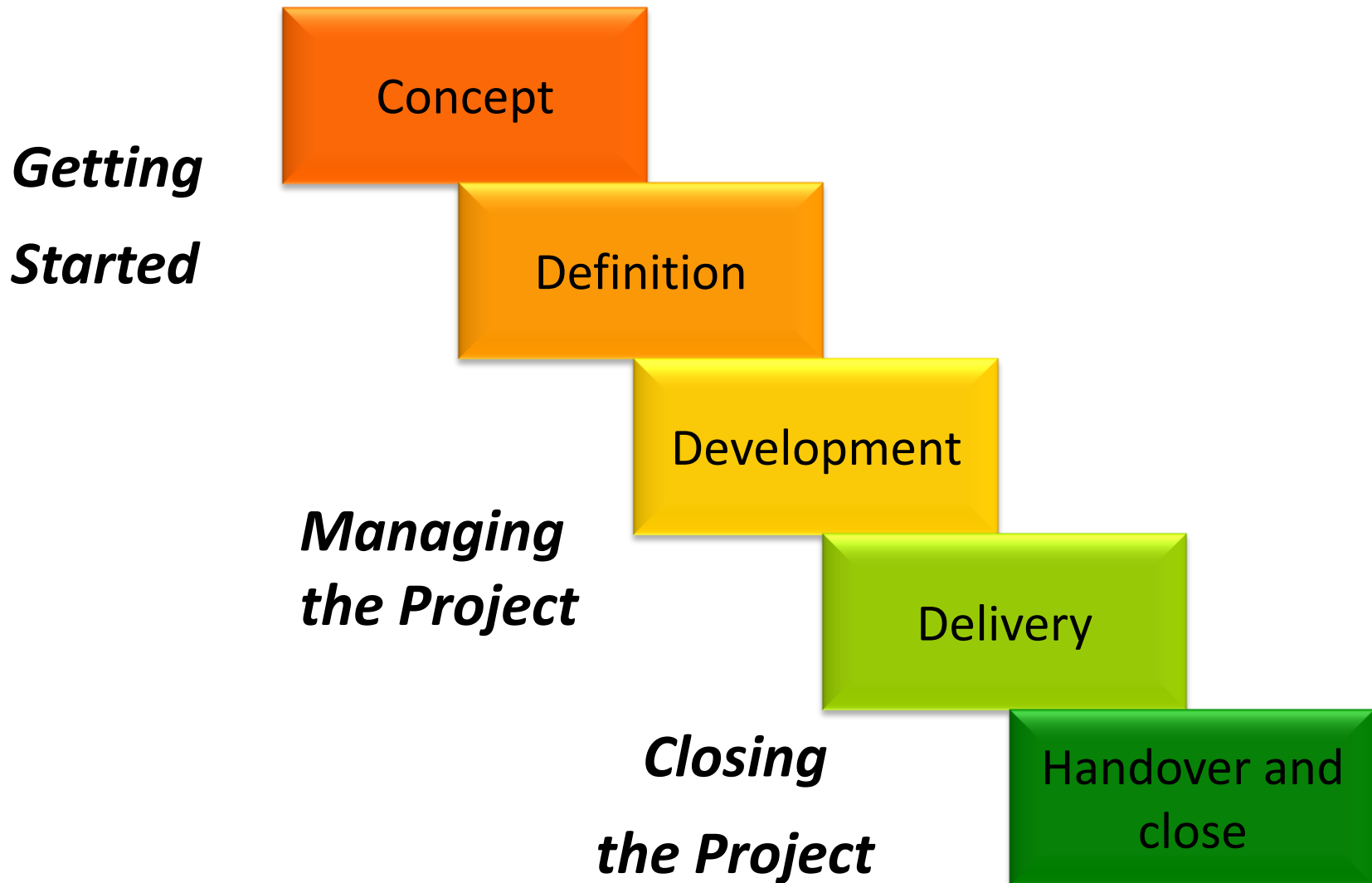
Do I have a project? Yes, if...

- I am introducing change by creating something new or altering an existing product. My project might include processes, procedures, systems, information and reports or roles and responsibilities
- I have been given a fixed start and end date
- There is an agreed budget or set of resources that come from an external source (e.g. a grant) or have been assigned from the budget for my department
- I need to identify and agree quality criteria for the new process, product, system, reporting line etc. before work begins.
- Whatever is agreed is subject to change as more becomes known about the products being created by the project, so I will need a mechanism for defining and agreeing changes to my work
- I need to define what work to do, when to do it and how long it will take
- There is uncertainty about the work because it has not been done before so I will have to identify and analyse the risks
- My project involves working with people from different units or departments

It is not a project if...

- My work is regularly performed, is the main part of my job and activities are undertaken to maintain the business at the current level.
- My work does include alterations or enhancements to day-to-day activities but these alterations are not so significant that they need to be separately organised, funded or reported upon
- I am assigned to this work for an indefinite period
- Funding is ongoing, will be internal and will be from departmental / operational budgets
- There are regular activities that happen throughout the year, but I do not have to create a separate plan for my work
- Whilst I have colleagues in other areas of the organisation my work involves a well defined group of individuals, the majority of whom are in the same department or unit
- Whilst small problems occur from time to time, I do not need to create a separate process for managing them
- I do not have to define any quality criteria for my work as this is already defined in the company quality manual or 'how to' guides that already exist for my department

Project lifecycle



Project management activities – getting started

- Identify the scope or breadth of the project – range of customers, types of products or services impacted, geographic scope, systems involved, job titles involved etc.
- Create a business case that identifies the benefits of doing the project and set them against the costs of the project and the risks that the project will fail to deliver what is expected
- Establish the organisation structure – who is involved in the project, what are their responsibilities, who do they report to, what level of authority do they have for making decisions etc.
- Create a high level project plan that clearly shows the key milestones and the points at which decisions about the continuation of the project should be made
- Establish the approach to managing the project – how will issues, changes and risks be dealt with, how will quality be assessed, how will information be stored and accessed and how will benefits be managed

Project management activities – managing the project

- Create a detailed plan for each stage of the project identifying activities, resources and outputs
- Delegate work packages to those named in each section of the detailed project plan and define how you would like them to report progress to you
- Deal with issues, changes and risks as they occur and re-plan where necessary
- Test the quality of each deliverable before agreeing that it is complete
- Create progress reports for senior management and communicate successes, issues and risks to all stakeholders

Project management activities – closing the project

- Ensure all of the users have been trained in how to use the deliverables
- Create a project closure report that summarises what was achieved and how closely the project met the project plan – was it on budget, on time and did it create deliverables of a satisfactory quality
- Create a project handover report that helps those responsible for implementing the deliverables to understand what further actions are required
- Define when and how the benefits of the project are to be managed

Common project management mistakes – Deliverables

Mistakes:

- Not asking enough people with specialist knowledge exactly what they need the new products to be able to do
- Not understanding how the products created by the project will be used i.e. what business problems they are designed to overcome or what opportunities they are expected to exploit
- Not asking 'what is good enough' or 'how will we know when we are finished'

Impact:

- Creating products that have all the features and functions requested by the users, but which don't actually solve the problems they were expected to
- Over-engineering the solution so that the products have too many features and functions which took more time and money to create than if you had delivered something that was 'fit for purpose'

Project management solution - Deliverables

- Ensure that those you involve in requirements gathering/scoping of the project:
 - Represent a range of management grades so that you include the perspective of senior and middle management and those doing the work
 - Include a wide range of roles impacted by the deliverables including internal and external customers, suppliers, auditors and regulators, opinion formers including marketing and sales staff
- Clearly state which business problem or opportunity the deliverables are expected to address and analyse every deliverable for its contribution, ensuring only those essential to the problem or opportunity are included in the project

Common project management mistakes - Planning

Mistakes:

- Planning too early, when you don't know enough about the project
- Planning without checking that what you have assumed (about who is available, or the order in which tasks can be completed) is true
- Not involving those who will carry out the activities on the plan, and who have specialist knowledge

Impact:

- The plan will have to be redone, taking up additional time and effort
- You will need to explain the differences to those that saw the original plan which is difficult, because later versions of the plan usually cost more and take longer

Project management solution - Planning

- ‘Plan the plan’, clarifying what information will be included and the level of detail that those authorising the plan can expect:
 - Manage their expectations so that they do not expect a detailed plan at the very start of the project when too little information is available.
 - Concentrate on agreeing high level milestones and fill in the detail as more information becomes known
- Do not plan until all parties involved in the requirements gathering/scoping of the project have signed off on their requirements
- Create a high level plan with major milestones but only plan in detail for each section of the project
- Define the end of each section of the project as a sensible point beyond which you believe it unwise to move without further senior management authorisation

Common project management mistakes - Benefits

Mistakes:

- Identifying benefits that appear positive but cannot be measured e.g. happier customers, easy to use website
- Defining measurable benefits but failing to measure the current situation so that at the end of the project benefits cannot be proven
- Claiming benefits in reduction of costs or increases in revenue that are not attributable to only one project but are the product of multiple initiatives

Impact:

- The business case does not provide rigorous evidence of the viability of the project, encouraging authorisation of the 'wrong' projects

Project management solution – Benefits

- Find the benefits by analysing the business problem or opportunity to be addressed by the project:
 - If the project is solving a problem, identify the current cost of the problem (time taken to deal with problem x cost of staff involved)
 - If the project meets an opportunity, quantify the opportunity in terms of additional customers, additional products or services to be sold, profit margin per product etc.
- Identify all the measures that are currently captured by the department where the benefits are to be claimed, and use improvements in these measures as the basis of the benefits of the project – do not fall into the trap of establishing new measures as this change in reporting is often a project in its own right
- Clarify if the benefits of your project are shared with other projects and claim only a percentage of benefits for your project (e.g. shared across two projects, only claim 50% of the benefits)

NEXT STEPS

If you would like to develop your understanding of project management we recommend these entry level courses: [PRINCE2® Foundation and Practitioner](#) or [APM Introductory Certificate](#)

If you would like to discuss how to develop project management within your organisation, please contact us to arrange a free business review – info@maventraining.co.uk

Call today on **020 7089 6161** to discuss your requirements or visit the [Maven website](#) for more information.

