

Project management essentials

Designed for the novice and occasional project manager, this introductory course uses workshop groups with a realistic case study to illustrate basic principles and to demonstrate how to juggle constraints of time, cost, quality and scope. The course includes project initiation, planning, scheduling and reporting, and briefly covers risk, quality and team management.

Summary

This course is designed for participants who are/will be required to manage business projects in which one or more of the following apply:

- the Project Manager or team members are not necessarily full-time on the project;
- projects tend to be self-contained (ie. without complexity of integration across numerous areas); and
- funding levels are not so extensive as to require more rigorous and formal methods of planning and management.

Learning objectives

At the completion of this program, participants will be expected to demonstrate capability in the following areas.

- Using a structured approach, prepare a project plan, incorporating appropriate plans, schedules, and specific outputs/deliverables for each step of the plan.
- Define the scope of a project, and identify means of controlling changes to the scope.
- Describe the sources of project risks, and a management approach to the control of these risks.
- Describe project quality objectives and identify appropriate controls to ensure quality outcomes are achieved.
- Describe processes, which can be used to develop ongoing stakeholder commitment to a project, and to manage issues arising from the project's dependence on external groups.
- Incorporate techniques which ensure commitment to project completion from a project team in a matrix management organisation.
- Describe methods for timely and accurate reporting of progress against plan

Course outline

Day 1

Introduction	Course approach, PM processes, stages, CSFs, typical project problems
Project Initiation	Project start -up activities
Project Scope & Stakeholders	Scope definition, scope changes, managing Stakeholders involvement
Lunch Break	
Planning	Work Breakdown Structure, dependencies, estimating, planning process, milestones, and schedule development
Wrap-up Day 1	Review of the day

Day 2

Project execution	Project teams, PM skills and training, task delegation, organisation change issues
Quality & Risk Management	Principles of Quality and Risk Management, how to control quality of project deliverables and risks
Lunch Break	
Status reporting and correcting variance to plan	How to determine accurate status, what to report, and what actions to take on variances to plan
Managing dependencies	How to ensure that other groups you rely on will deliver as agreed - to time, quality, scope and cost
Wrap-up Day 2	Review of course alternative approaches planned follow-up activities

Notes:

1. Some of the material has been taken from the book "A Guide to the Project Management Body of Knowledge" published by the Project Management Institute Standards Committee. The content of this book has also been accepted by the Australian Government as the basis for National Competency Standards for Project Management. Excerpts from the Guide can be downloaded free of charge from www.pmi.org or it can be purchased on-line from the PMI or Standards Australia

2. This course alludes to the features of planning tools such as Microsoft Project but does not teach how to use it. The material covered in the course however assists in collection of data to drive these tools.

Presenter

John Flynn has wide experience in management consulting, project management, market research and analysis, economic forecasting, and PC software package design and development, as well as in marketing, divisional and general management, in Australia, the United States and in the Far East. He has advised or consulted with all the major computer vendors, as well major software vendors and users. He has also written numerous reports on market projections and technical trends in the industry for clients throughout the world.

Related courses

- Project management for practitioners
- Managing supplier relationships
- Assessing risk in business, projects and investments
- Managing projects using Microsoft Project
- Portfolio and program management - linking projects to strategy

Seminar Project - Case Study

Case study: Transition Technologies Training Seminars

Introduction

This case study is for the purpose of applying the principles of Project Management in a training course situation. It may or may not fully reflect real life situations. Please read this case before you come to the course. Specific group activities based on this case will be allocated during the course.

Background

Transition Technologies Pty Ltd (TT) is a well-known Sydney-based training company specialising in short training seminars for high technology companies. They have a reputation for providing advanced training across a range of industries using leading figures within each industry. Their client base includes the largest manufacturing and high technology companies in the country, and they occasionally advertise selected courses in Singapore, Malaysia and Hong Kong, to maintain a high profile in the Pacific region among their multinational clients.

The company runs courses across the entire country, with at least one complete series of seminars in each capital city in Australia. Once a year they run specific seminars in Wellington and Auckland, New Zealand, subject to demand in this smaller and more specialised market.

The company is very responsive to industry trends. It has a policy of researching market demand through its large database of attendees, the company publishes a quarterly catalogue of proposed seminar topics, and its staff carefully monitor the level of interest in each seminar.

Once a seminar topic is confirmed, the research staff finds suitable speakers who are well-regarded in their field and actively recruits them to present the sessions. A seminar typically runs from one to two days and will involve two or more speakers using audio-visual presentations to provide variety and interest to the audience. TT's support staff arranges for suitable support equipment at the venue and handles production of workbooks and handouts, overhead slides and other relevant visual aids.

Staff act relatively independently and have complete responsibility for a group of seminars. TT monitors the success of its seminars by surveys of attendees and reward staff with bonuses based partly upon these ratings and partly upon their success in generating repeat business from established clients.

Personnel

Transition Technologies employs a total of 25 people. Their founder, Mark Tranley, an ex-consultant from McKinsey, is managing director, and he alone has a personal assistant. Their other senior staff comprise Jack Munday, an accountant who has two full time staff for billings and general accounting, Grace Macnamara, a research librarian who controls their extensive reference material, a sales manager, Sandy Coleman, and her assistant, and Greg Townsend, the Operations Manager who is ultimately responsible for running the seminars.

Three support staff report directly to the Operations Manager. They are responsible for producing advertising fliers and the quarterly catalogue, and provide the support for mailouts and other promotional activities. They also provide administrative support for five

Seminar Coordinators who are each responsible for managing a series of seminars. The Coordinators also report to the Operations Manager, but are relatively autonomous.

TT's sales manager has two local sales staff, one responsible for existing clients, and one for new business. In addition, they have training offices in Melbourne and Canberra, each managed by another salesperson. Each of these salespersons has an administrator assistant and one Seminar Coordinator in their local office.

Graphical design work and printing is outsourced, as is advertising. Seminars are conducted in public venues, such as hotels and universities, and facilities are provided by those venues, although these venues are carefully screened and monitored to ensure that they remain suitable to their very demanding clientele.

Despite the degree of outsourcing, TT requires that the final production version of the work books and handouts be prepared inhouse to maintain their quality. The Coordinators and their administrative support staff carefully check these documents before printing.

Current situation

Transition Technologies runs a lean but profitable operation by relying on outsourcing and very careful control of their business processes. They rely upon experienced Coordinators to ensure that each seminar runs smoothly and they use established procedures to maintain the quality of their product, which accordingly commands a premium price.

As they expand their operations, they need more Coordinators with experience in new areas, such as Information Technology and Biological Sciences. They also wish to expand their operations to the Pacific area, by offering more seminars in ASEAN countries. Their main constraint is their small size. They need to expand their staff without jeopardising their quality and reputation. The key to their future success lies in “packaging” their skills so that new staff can follow the standard approach with minimal supervision, applying the standard “recipe” even when they have the additional complications of planning and managing training seminars in other countries.

Mark Tranley is an experienced consultant trained by one of the world's leading firms, and is used to conducting business with established procedures and standards. Recognising that each seminar is in effect a mini project, he wishes to research the methods currently used by his staff to establish a project handbook that can be used as a reference by his professional staff, while providing training and orientation for newly hired Coordinators. The exercises which will be allocated and undertaken in class will be based around developing Project Management material for a typical seminar.

Objectives

Since TT's seminars follow a standard format, there is a considerable body of experience in organising seminars within the organisation. Experience shows that there are several phases to conducting a seminar:

- Preliminary Planning - in which the topics are chosen, suitable speakers selected and contacted, and suitable dates and venues nominated.
- Detailed Planning, during which plans for the venue and speakers are finalised, and the seminar brochure and publicity campaign are organised.
- Implementation, during which they select prospective attendees, conduct mailings, print brochures, prepare and print handouts, process course bookings, prepare the venue and

make a go or no-go decision about the seminar. If they decide to conduct the seminar, they will monitor their attendees to determine their satisfaction with the session.

- Closure, during which they finalise the accounts, review the client feedback and other information about the conduct of the seminar and assess the prospects for repeating the seminar in future.

The entire process, from preliminary planning to conducting a post-seminar review with the Operations Manager, is the responsibility of one Seminar Coordinator who acts as the project manager. Although the seminars are conducted throughout the year, each has its own issues and problems. However, the Coordinators can resolve most of these on their own initiative.

Mark Tranley's objectives are to develop:

- A task list or work breakdown structure based upon those currently used by his Coordinators. This should define the “standard” activities involved and will document the process for training new staff.
- Determine a typical time table suitable for most seminars, taking all the required tasks into account. This time table should have enough leeway to permit a go/no-go decision to be made in time to save money and effort when a seminar has no chance of success.
- Guidelines which identify common problems and issues which could help inexperienced staff develop suitable contingency plans.
- Clear measures of quality and standards to ensure the company retains the respect of its client base (and its premium price structure!).
- Reporting standards so his managers can monitor progress on each seminar, yet leave the detail to the individual Seminar Coordinator.
- Appropriate measures of success that are understandable to his staff so that each staff member knows what is required and how this will be used to measure their contribution to the business each year.

He wishes these to be brought together progressively and circulated for consideration by each of the staff. Since his existing Coordinators and support staff are highly experienced, he wants to consult them extensively, and document how they currently carry out these tasks.

The project team

A team usually consist of a senior Seminar Coordinator who has been allocated to this seminar on a part-time basis, running at least two other seminars in parallel. In addition, each coordinator has a designated assistant from the Operations Manager's team to do administrative followups, such as contacting seminar venues or phoning printers. Other staff are available to assist Coordinators part-time as required

Greg Townsend, the Operations Manager, requires weekly updates of progress from each Coordinator to anticipate any additional temporary help required, and for his reports to Mark Tranley.

Greg has a high degree of delegated authority and can approve most normal expenditures for a seminar. However, Mark is always consulted on seminars where the attendance is falling behind the required target, as he has ultimate go/no-go authority.