

# I P M

Integrated  
Project  
Method

An Overview of the Knapp and Moore approach  
to managing projects in modern organisations

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## Chapter 1 – Introduction to Project Management

***“within this sea of change, each moment was experienced as if to be in perfect balance and I knew then what it meant to live on the razor’s edge”***



### Introduction

The modern organisation runs a lot of projects. It could be said that running projects is a part of most organisations’ core business, and running projects *well* is a core competency.

Unfortunately this core competency is often less than required or desired.

With this in mind, the *Integrated Project Method* (IPM) has been developed by Michael Knapp, principal of Knapp and Moore, over the past 10 years. The method has been applied to projects of varying size, risk, complexity and importance and found to be very effective in the successful management of projects (see Page 6 for a definition of the type of projects supported by the IPM).

This overview provides a basic understanding of what the IPM is, and how it could be applied to the wide variety of projects being conducted within the modern organisation.

### Where Is Project Management At?

There was a time when running projects was seen as the domain of Information Technology. Not any more. Projects and project management have pervaded every unit within the modern organisation. Most managers are responsible for either sponsoring or managing one or more (sometimes many more) projects and increasingly staff are spending a substantial part of their jobs running or being a member of projects. With so much focus on projects, it is a good idea to formalise how to manage projects well – which is where the Integrated Project Method comes in.

# What Is The *Integrated Project Method*?

## Definition

The IPM is a set of processes, procedures, techniques and key deliverables which enable project managers and those acting in a project governance capacity to successfully initiate, plan, run and complete a project. The method is delivered using standard Microsoft Office desktop applications (such as Microsoft’s *Word, Excel, Access and PowerPoint*)

## Audience

The IPM is intended for anyone involved in a governance role – that is, Executive Sponsors, Sponsors, Project Managers, Team Leaders and key project stakeholders, such as Steering Committee members.

## Basis for The Method

The IPM is based on the principles of ‘best practice’ Project Management incorporating processes and techniques which are appropriate for the environment, culture and special conditions found within modern organisations. The method correlates well with the Project Management Institute’s *Project Management Body of Knowledge* (PMBOK), although the IPM was developed completely independent of the PMBOK. All the practices covered in the IPM are industrialised – that is, proven in real-life organisational projects.

## Overview Of The Method

The IPM is represented as a set of Management Processes and Procedures. The schematic is shown below:

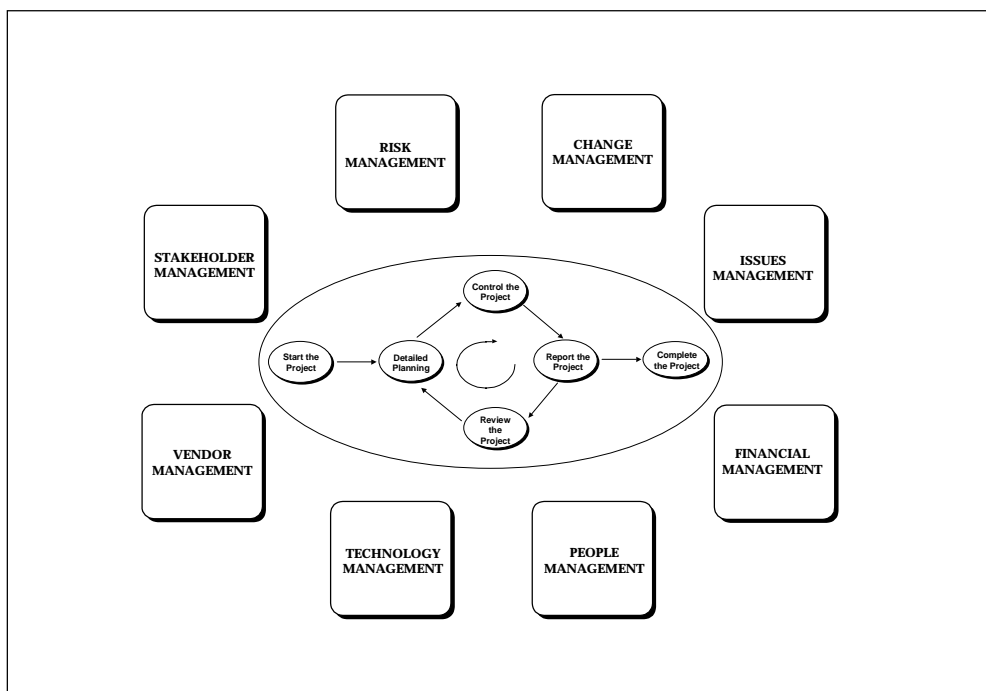


Figure 1.1: Schematic showing the 6 Core Processes and 8 Procedures making up the IPM

As this model shows, there are 6 key processes which make up the IPM. These processes are meant to be intuitive so there is probably nothing surprising here. Surrounding these processes are what are known as the Management Procedures. These 8 procedures are carried out on a continuing basis throughout the life of the project. In one sense, they support the core processes.

The key to this approach to project management is its simplicity and flexibility. The method can be applied to any type of organisation project, from major core system redevelopment projects through to organisation change initiatives, small system enhancement projects and product development and marketing projects. In fact, wherever change is to be introduced we probably have a project, and the IPM is an appropriate tool by which to manage the project.

## Implementing The IPM

An organisation's culture is demonstrated in how it runs projects and its attitude towards projects and project management. The level of detail and discipline applied to project management is often determined historically – that is, it has evolved over time as the number and complexity of projects has grown. In many cases, the application of the requisite management practice lags the needs of a project.

**In essence organisations react to project failure rather than implementing the level of practice necessary for project success.**

### A Model For Continual Improvement

Figure 1.2 shows the 3 core components necessary to improve practice:

#### Implementing Improved Practice

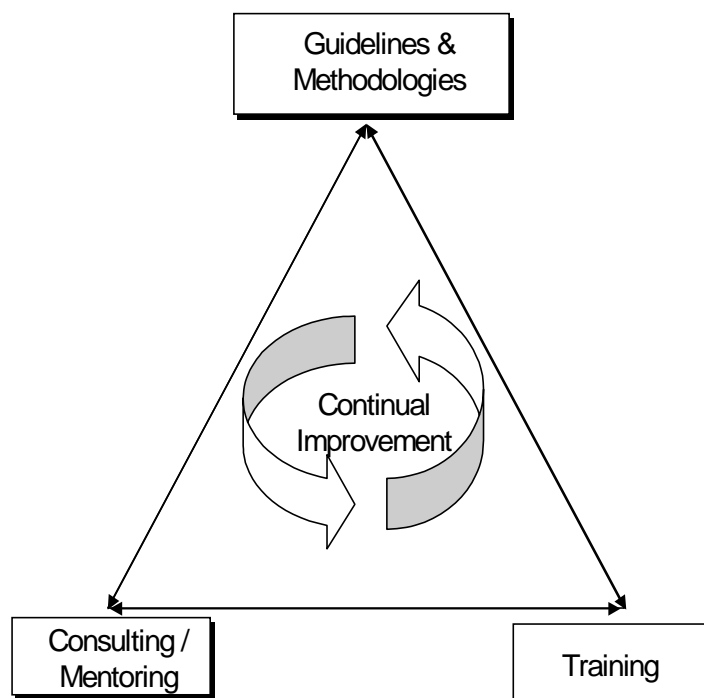


Figure 1.2: The core components necessary for continual improvement in project management

The interaction of the 3 corners of the triangle creates the dynamic which works towards implementing improved practice. The model works this way:

The practice is defined as a method – that is, a set of processes, procedures, deliverables and techniques which, collectively, define how the Organisation intends to manage its projects. This method is the IPM tailored to map to the type of projects being run and the Organisation's set of standards (if any exist!). The method could be in the form of a manual (such as a Project Management Handbook) or it could be presented as a knowledge-base using the Organisation's Intranet. Knowledge of the method is disseminated via a series of training workshops and information sessions. Back on the job, practitioners are further supported by hands-on coaching and consulting which may be provided by specialists hired from outside the Organisation (in the first instance), and subsequently provided by the Organisation's personnel on either a part-time or full-time basis.

By applying the practice to real-life projects, changes can be identified to further improve the method which is updated and released throughout the Organisation on a regular basis.

## Chapter 2 – Understanding Projects



### Introduction

Whereas many (if not most) organisations run projects, project management is not part of an organisation's typical or traditional make-up. What the typical organisation does well is to run processes, with a focus on the optimisation of those processes through measurement and standardisation.

It is no wonder, therefore, that projects are so difficult to understand and manage. Projects, by their very nature, are non-standard. It is difficult to run a project as a set of highly engineered, repeatable and predictable processes. This does not mean there have not been attempts to run projects as repeatable and highly engineered processes – in fact there are organisations where project management has always been a central competency (such as Software Developers) where they attempt to run projects against quite sophisticated and well structured methods and well defined, and to a large extent, stable, statements of scope. In these environments, changes are closely controlled, as is quality, productivity and performance. Contrast this with a lot of organisational projects where changes are continual (and often not well controlled) meaning priorities, time frames, resourcing, budgets and scope all change – leaving the project and the project manager both battered and bruised.

**The bottom line is that projects do not meet expectations and deliver claimed benefits because organisation behaviour works against this happening. Running projects in a professional and disciplined manner is simply not part of the culture of many organisations.**

This chapter analyses some of the attributes which describe a project.

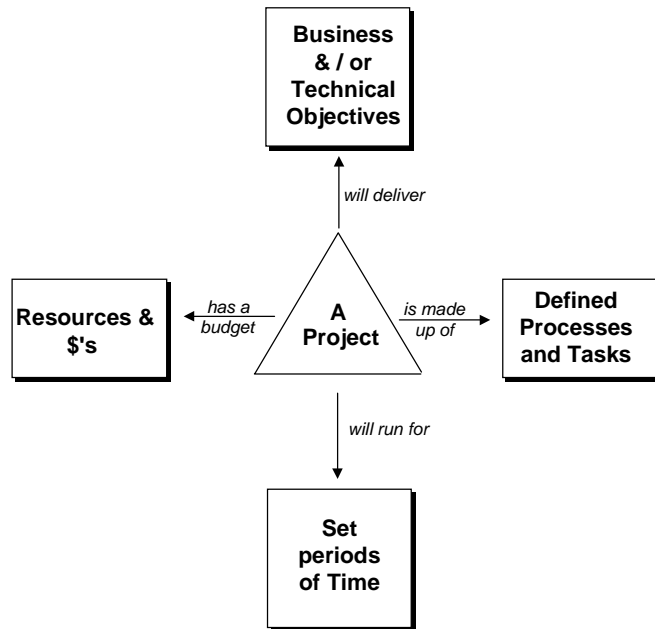
# What's A Project?

## Generic Attributes of a Project

The simplest definition of a project is shown at right.

Put simply, a project is an organisation of people as well as other resources, brought together to meet specific objectives within a finite period of time by carrying out a set of planned activities.

Critical to this understanding is that projects are anchored in time: setting and meeting milestones is essential to running effective and successful projects.



The key attributes of a project are:

<i>Business and / or Technical Objectives</i>	A project must be directed to meeting one or more objectives. These objectives are, in general, based on one or more business objectives which may be defined in a business unit plan or strategy.
<i>Defined Processes and Tasks</i>	Projects operate by activities and tasks being carried out in a ordered fashion which work towards producing deliverables. There is a very strong connection between what is done and what is produced.
<i>Set periods of time</i>	Projects are not open-ended. Projects have one or more milestones which serve to identify key deliverable points as well as act as markers to indicate project performance.
<i>Resources and Budgets</i>	Projects have a budget, which is largely made up of human resource costs for organisational projects.

## Specific Attributes of a Project

Not everything that moves is a project. A common problem is to identify quite small units of work as a project, whereas they may be Work Assignments, Activities or Tasks. Conversely, very large projects may be made up of quite distinct projects and possibly represent a Program. The following table gives some guidelines for identifying units of work:

<b>Unit of Work</b>	<b>Elapsed Time (weeks)</b>	<b>No. of Resources</b>	<b>Total Effort (effort hours)</b>	<b>Total Budget</b>
Work Assignment	< 4 – 6	< 3	< 200	< \$25k
Small Project	6 – 10	< 4	< 500	< \$50k
Medium Project	10 - 16	< 10	< 4,000	< \$500k
Large Project	16 - 26	< 50	< 50,000	< \$5m
Very Large Project*	> 26	> 50	> 50,000	> \$5m

\* - Very Large Projects may be identified as a Program, broken into component Projects and managed as a series of Releases. This represents both vertical and horizontal ‘unpacking’.

Of course this is a guideline only and there are significant differences in determining project size depending on the type of project, complexity and overall risk.

One reason why understanding the size of the project is so critical is that helps determine the level of project management discipline or practice that needs to be applied to the project for it to be successful. The consideration is that project management is a ‘fitness-for-purpose’ set of practices which reflects a fine balance between creativity and discipline. It is indeed the razor’s edge.

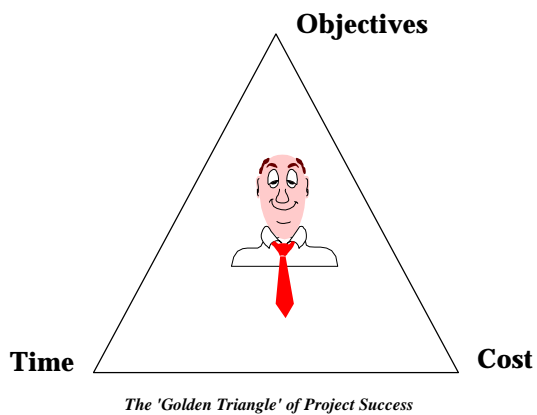
# Project Success and Failure

## Project Success: A Definition

The traditional ‘Golden Triangle’ of project success has been used for many years. A modern slant on this definition of project success focuses on the client – meeting (if not exceeding) their expectations as well as recognising there is a partner relationship between project manager and client.

Process success is said to have occurred when:

- ⇒ *The client is delighted*
- ⇒ *The agreed objectives have been met and the benefits realised*
- ⇒ *The project kept within the agreed budget*
- ⇒ *Milestones were met.*



This definition of success differs markedly from the popular idea that a project was successful if it was not cancelled!

## Project Failure

It is widely accepted that up to 80% of organisational projects fail to satisfactorily meet all the criteria of a successful project. Typically, the most noticeable aspects of failure are to do with cost and time over-runs:

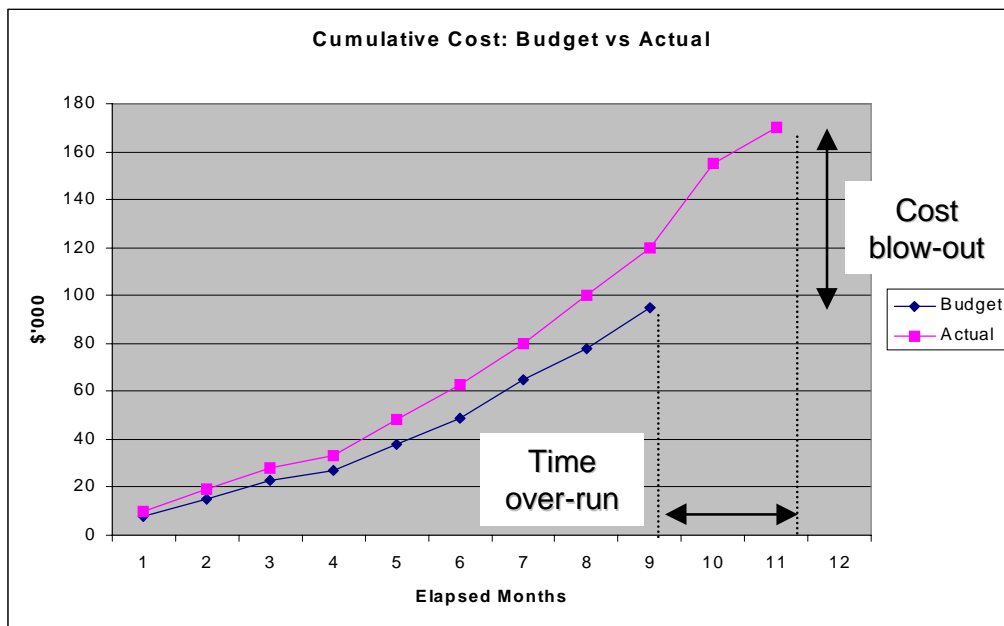


Figure 2.1 – Typical time and cost over-runs

The impact of project failure on an organisation may appear minimal when viewed from the perspective of a single project, but the cumulative effect across all projects often represents a substantial impact – especially in the areas of additional costs and lost opportunities.

For instance, assume an organisation budgets \$100M for all operations, with 30% of the budget being used to fund projects.

Assuming an average cost blow-out of 30%, the excess cost to run these projects is \$9M. It is probable that lost opportunity costs will be much greater.

Of even greater importance is understanding the failure due to a project not delivering its claimed benefits. A projects often fails to meet its business case, sometimes to the extent that the business case turns negative! Increasingly, as projects are the preferred vehicle for organisations to meet their strategic goals, failed projects lead to failed organisations. Conversely, ensuring project success is being seen as a strategic advantage – possibly the most critical factor separating demonstrably successful organisations from the pack.

## Why Projects Fail

Projects rarely fail due to a single cause. Rather it is a combination of many factors. The main causes of project failure are:

Cause	Impact
<i>Poor senior management buy-in</i>	If key stakeholders do not buy-into the project, and offer either passive support, zero support or actively work against the project, then the project simply will not work, regardless of the ease or complexity of the project, or skill of the project team.
<i>Accountabilities not met</i>	Stakeholders not honouring accountabilities
<i>Estimates are wrong</i>	Poor estimation is ubiquitous with organisation projects. The reasons why this is the case are simple: estimation techniques are poor or non-existent and there are few (if any) suitable metrics to support the estimates.
<i>Risk is not managed</i>	Project failure, in most cases, can be predicted. The purpose of Risk Management is to identify risk before the fact and put in place procedures and contingencies to manage risk. In many cases, risk management is a nominal process or simply not done.
<i>Inexperienced managers and team</i>	One of the best indicators that a project may be successful is the existence of a positive track-record. Organisations that take on projects with no or little experience in that type of project are harvesting trouble.
<i>Scope change not controlled</i>	From day one of a project, the forces of change are at play impacting, in particular, project scope. Without adequate procedures to manage change, time and cost blow-outs will occur, often of the order of 30%+.
<i>Insufficient resources</i>	It is the modern mantra: “My project is under-resourced”. In reality, organisations often have little idea of the total number of resources required for all projects running concurrently. A major flaw in project initiation arises from senior management endorsing projects without ensuring that resources will be made available at appropriate times.
<i>Interdependencies between projects not well managed</i>	Projects do not run stand-alone. If the interdependencies between projects are not clearly defined and explicitly managed, any

Cause	Impact
<i>Time frames too ambitious or too long</i>	problems that one project experiences may be replicated across many projects. There is a fine balance between successfully delivering against an ambitious time frame and completely blowing an impossible delivery schedule.

### Why Projects Succeed

The figure below shows the 4 key factors necessary for project success:

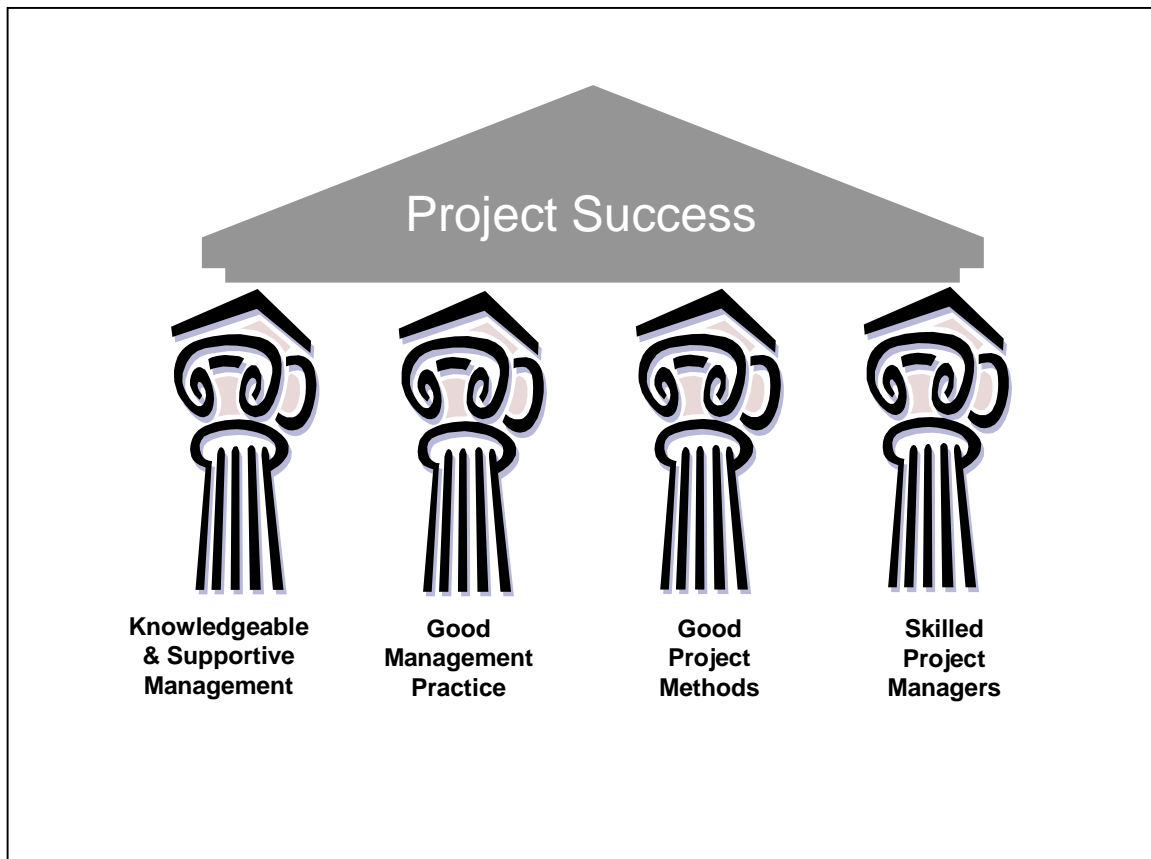


Figure 2.2 – The 4 ‘pillars’ of project success

Factor for Success	Description
<i>Knowledgeable and Supportive Management</i>	Senior management involved in projects, project sponsors, Project Review Board members and key stakeholders should all: <ul style="list-style-type: none"> <li>⇒ Be aware of, and commit to, their accountabilities to the project.</li> <li>⇒ Ensure adequate and appropriate resources are assigned to the project.</li> <li>⇒ Ensure issues are resolved and decision-making occurs.</li> <li>⇒ Be aware of project dynamics and how the project will behave.</li> </ul>
<i>Good Project Management Practices</i>	Project Management methods: <ul style="list-style-type: none"> <li>⇒ Need to be appropriate for the size and complexity of the project: a ‘fitness for purpose’ model.</li> </ul>

Factor for Success	Description
	<p>⇒ Need to be standardised. Practice and terminology across all projects need to be consistent so all involved speak the same language.</p> <p>⇒ Clearly deliver benefits and add to project success.</p>
<i>Good Project Methods</i>	<p>The project team must have know-how. There is little chance for meeting expectations and time and cost constraints if a 'suck it and see' approach is taken. Where there is little or inadequate experience, then know-how should be brought in to the project.</p>
<i>Skilled project managers</i>	<p>It appears that organisations that treat project management as a specific skill-set, with its own career development path and professionalism, increase project success. As intuitively obvious as this may be, existing inertia within organisations often sees a move towards professional project management resisted.</p>

None of the above factors just happens. It is a primary role of senior management to ensure each factor is implemented and managed. An unavoidable factor which delivers improved project success is that good practice must be driven 'top-down'. There is little chance that project managers and team leaders will adopt improved practice unilaterally without a corresponding change in practice at the senior management level. Furthermore, the more senior managers understand about good practice, the more expectations will be set that 'this is the way we do it around here'. Good practice becomes the norm.

The incremental improvement in project management is often aligned to where the organisation sits in terms of its project management maturity.

# Project Management Maturity

A fundamental shift for many organisations over the past 10 years is that as larger, more expensive, higher risk and cross-functional projects have been tackled, the level of project management practice has improved to ensure project success. In many cases improvements in management practice have often been spurred on by the stings of failed projects. Once seen as the domain of Information Technology, project management is increasingly viewed as a mainstream set of management practices, being seen as core competencies similar in importance as practices in financial management and asset management. This emerging maturity in management practice can be represented as shown below in Figure 2.3:

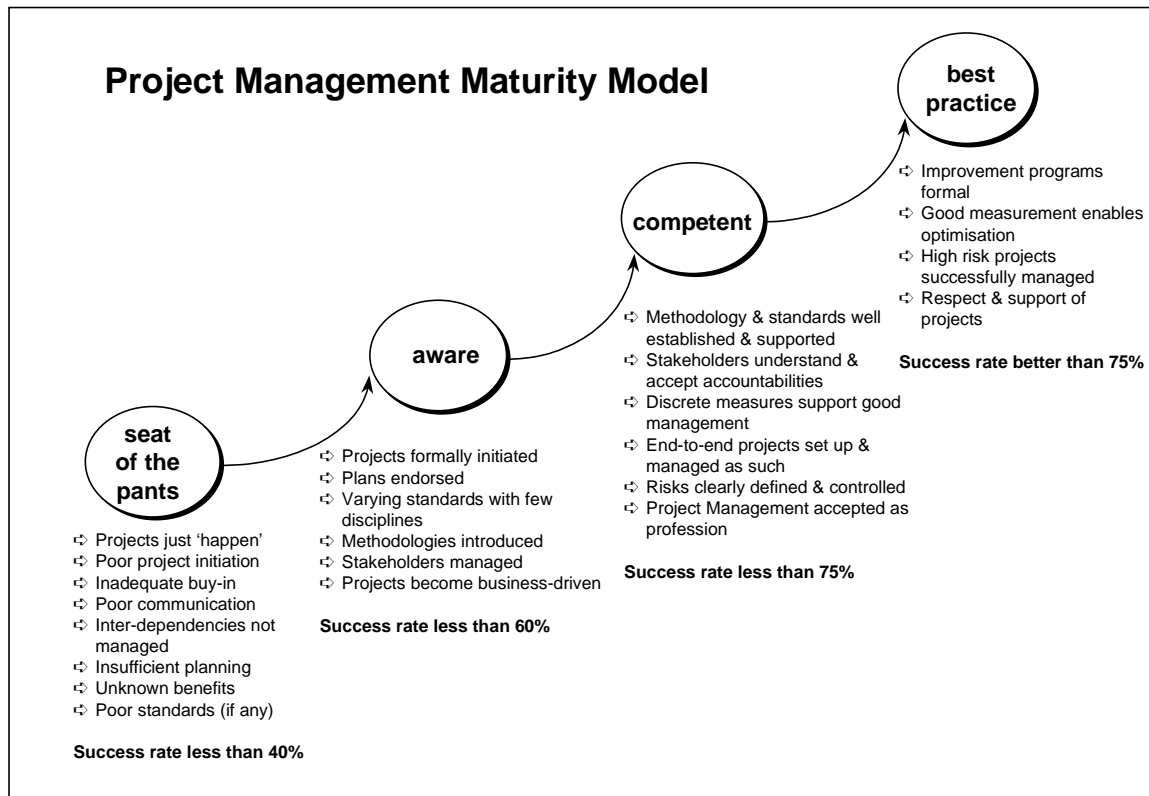


Figure 2.3 – Project Management Maturity Model

Figure 2.3 shows the way in which an organisation increases its ability to manage increasingly more complex and riskier projects. This organisation capability in managing projects – its ‘maturity’ – is defined as being across 4 stages. It is typical that an organisation will not be consistently rated as being at just 1 stage. In fact, very large organisations can exist across all 4 stages, depending on who is running the project and the project’s profile: whether it is a low-priority, one-off project or whether it is a large, complex, cross-divisional, strategic project. Unfortunately, some of the latter project types tend to have the lowest level of management practice, a rich and consistent recipe for disaster.

The purpose of this model is to target improvement. Once an organisation knows its current stage and where it should be, depending on the type of projects it intends running, then it can mount an Improvement Program designed to elevate its practice to the target Stage.

<b>Maturity Stage</b>	<b>Description</b>
<i>Seat of the pants</i>	<p>Projects happen. Often not formally initiated, organisations often find they have many more projects under way than officially recognised. Projects often do not have formal structures, endorsed plans, business cases or assigned resources. Milestones are often not set or reported against, and there is little in the way of performance measures or measures for success. There is little in the way of formal governance and probably no steering committee. The main problem with this stage is that, when applied to small projects, ‘seat of the pants’ appears to work. In reality what works is the skills of individuals to make the project successful against all odds.</p>
<i>Aware</i>	<p>One of the consequences of failed projects in organisations in the ‘Seat of the pants’ stage is that blame is usually laid at the feet of the project manager. The panacea is often seen as being one of training – train the managers and projects will be successful. This concept is not only naïve, it is widespread and very dangerous. Improvement in project management is an organisational issue – as much to do with those in a position of project sponsorship as with project managers and leaders. The Aware stage is where formal project management methods are introduced into the organisation. Projects are now initiated with a formal document (such as Initiation Report), and governance structures such as Steering Committees are set up. Some projects stakeholders see this move as a fad, and pay lip-service to the new practices, while others go overboard and see everything that moves as a project. The reality is that project management is not a central part of the organisation; it’s still not part of the culture or seen as part of its core competencies. Common deficiencies encountered are poor resource management and accountabilities either not being adequately defined or honoured.</p>
<i>Competent</i>	<p>Organisations in the ‘Competent’ Stage have adopted project management as a core competency. Project managers are recognised as professionals in their own right and project management is seen as a full-time position. Most telling is that these organisations have a clear understanding of their capabilities in running projects and may bring in project-partners for very large or high risk projects. The benefits of good management practice are no longer debated, and management methods are well established, formal and carry the stamp of the particular organisation. Projects are not initiated unless there is a high level of confidence in the organisation’s ability to be successful. Resources are well managed, but not necessarily dedicated to projects on a full-time basis. Accountabilities are clearly defined – but not always honoured. Scope is well contained and allowance for change and risk is always made when planning projects. It is generally the case that these organisations also have very effective methods in managing quality.</p>
<i>Best Practice</i>	<p>It is possible to get to ‘best in class’, but it isn’t where all organisations should necessarily strive to be. The organisations where projects are their business should be at this stage – and many are. Organisations in the engineering, construction, manufacturing industries often have well developed methods in project management. Surprisingly, however, where their project management methods are excellent in say, their manufacturing projects, their administrative, finance and IT projects are not necessarily at the same level. One characteristic of best-in-class organisations is their improvement programs. Setting targets, measuring performance and identifying and implementing improvements is part of the culture. There are very few organisations exhibiting best practice when it comes to managing organisational projects.</p>

# Projects and the Organisation

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## Change Drives Projects

Change within modern organisations is driven by a combination of external forces (the ‘business imperatives’) and internal initiatives, such as re-organisation. The organisation’s response to these forces is often represented as a series of plans. Without attempting to describe the various planning processes it is sufficient to state that the vehicle used to implement these plans is the ‘project model’. The following is a non-exclusive list of factors driving organisation change:

- ⇒ Keeping the shareholder happy
- ⇒ Keeping the customer happy
- ⇒ Implementing new business models: B2B and B2C
- ⇒ ‘Results driven’ business planning
- ⇒ Responding to rapidly changing markets, products and services
- ⇒ Meeting the demands for increasingly shorter time to market
- ⇒ Automation driving process improvement
- ⇒ New employment models: outsourcing, enterprise bargains and ‘fee for service’
- ⇒ The need for cost rationalisation
- ⇒ New technologies and systems
- ⇒ New management practices
- ⇒ Outsourcing and insourcing

**A simple but largely correct view is that the ‘project model’ can be used to deliver the changes being driven by the above list of imperatives.**

Project management is emerging from its traditional home inside organisations – Information Technology – and is now moving closer towards the centre of the organisation as it is increasingly seen that the project model is an efficient vehicle for delivering change. There is an unfortunate link between project management and information technology: the ‘guilt by association’ factor has placed project management in an unfortunate light due to the very poor record of IT projects. Fundamental to this poor performance, however, has been the reluctance bordering on ignorance of non-technology organisation units to embrace good project management practice. The resulting marginalisation of IT (as an organisation unit) and project management (as a set of management practices) has given the impression that ‘project management doesn’t work in this place’.

**The reality is that project management works very effectively to deliver organisation change when it is embraced by all involved organisation units.**

There is a close tie between business planning and project definition. The changes as defined in business plans can be directly mapped to the projects scheduled to be undertaken during the planning period. This relationship enforces a tighter definition of the benefits to be delivered by a project, and encourages a closer inspection of whether claimed benefits are actually realised.

## Project Structures

Projects are often structured in a ‘stand-alone’ fashion – that is, with a project manager and team expected to work in a somewhat independent fashion, often with little regard for other projects or initiatives running interdependently or concurrently. This view of projects, with few exceptions, is wrong. The model in Figure 2.4 shows how projects are now managed in an ‘end-to-end’ fashion:

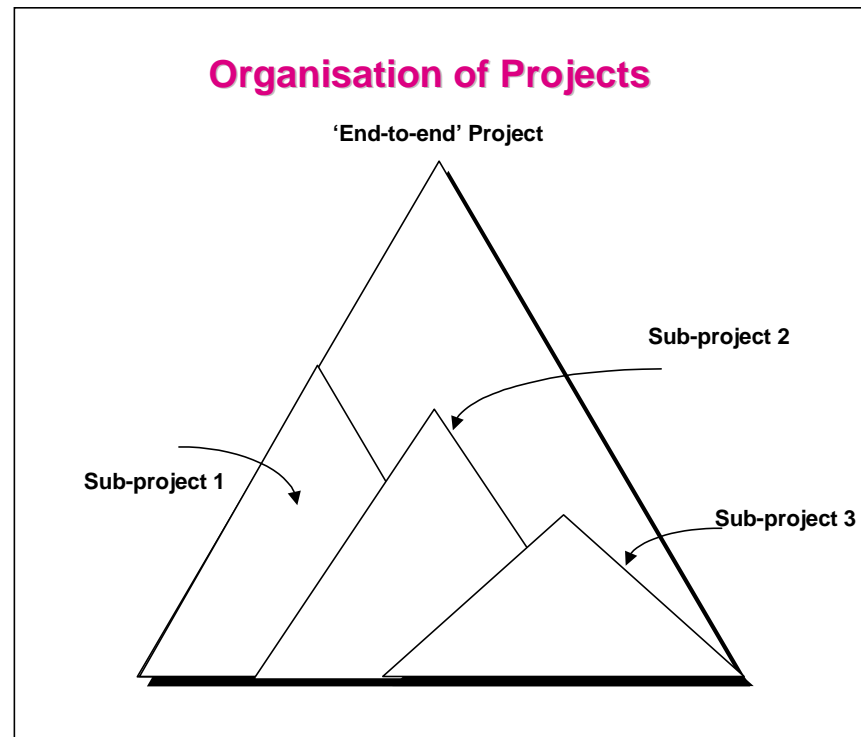


Figure 2.4: Organisation of the ‘end-to-end’ project

The identification of sub-projects flows from understanding clear accountabilities – that is, like accountabilities grouped under a single structure become a sub-project.

Example:

The above model, if applied to a Systems Development and Implementation project would see the following sub-projects set up:

- |                      |  |
|----------------------|--|
| <i>Sub-project 1</i> | <b>IT Project.</b> This project would cover the normal Systems Development Life Cycle phases and activities.                     |
| <i>Sub-project 2</i> | <b>Business Project.</b> This project would cover business needs specification, organisation change and procedure specification. |
| <i>Sub-project 3</i> | <b>Implementation Project.</b> Included here would be data conversion, training, communication etc.                              |

A valuable interpretation of this model is that due to the cross-functional nature of many projects, the broad allocation of accountabilities is managed via the specification of a number of sub-projects working together under a single, ‘end-to-end’ project arrangement.

# Project Dynamics

The study, measurement and prediction of project behaviour is known as *project dynamics*. A lot of understanding about these dynamics is derived from a branch of physics called ‘Dynamic Systems Theory’. As distinct from systems analysis, dynamic systems theory views systems organically such that the behaviour of a project is the net result of a large number of discrete impacts operating simultaneously and across time. In practical terms, a clear understanding of project dynamics is required to clearly understand project behaviour and answer the myriad ‘what happens if...’ type questions which arise throughout a project.

## Understanding Project Dynamics

The following model represents some specific factors which collectively describe ‘dynamics’:

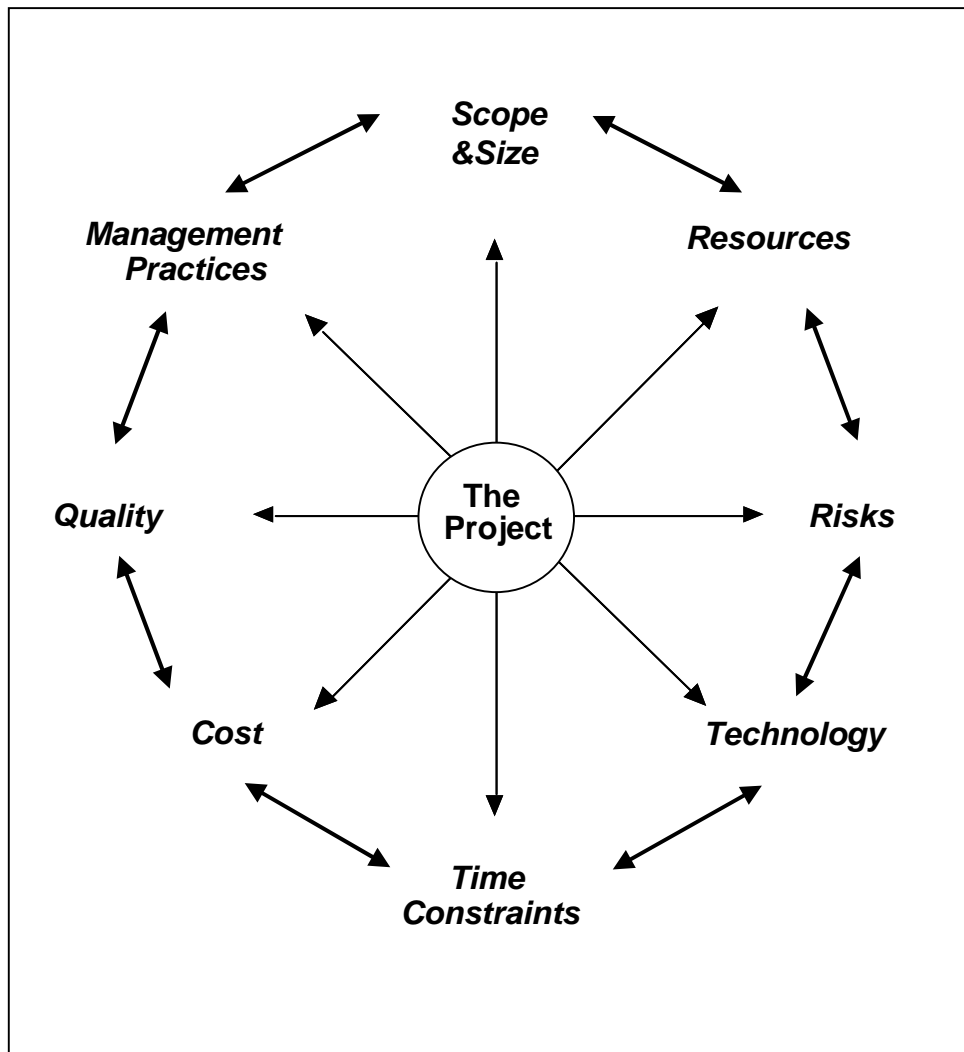


Figure 2.5: The factors which influence project behaviour – the ‘Project Dynamics’

## Project Dynamics and Paradoxes

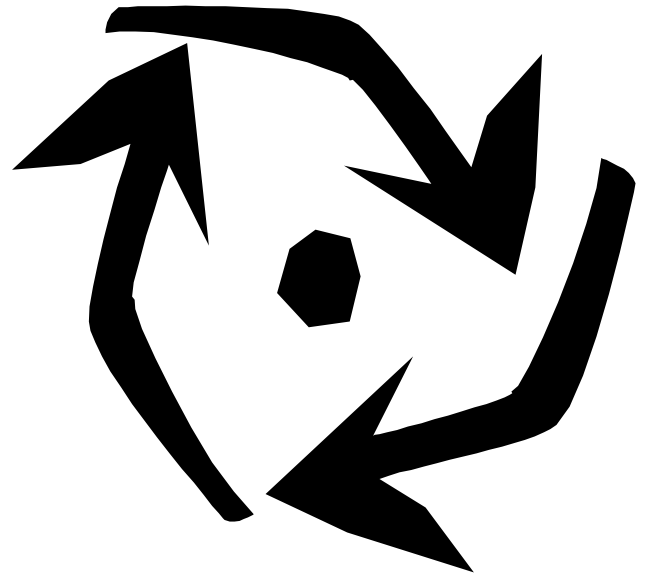
Sometimes projects behave counter-intuitively or paradoxically. An understanding of project dynamics, however, can assist in explaining what can otherwise be somewhat baffling outcomes. The following table illustrates some of these paradoxes and explanations:

Paradox	Explanation
<i>Adding resources to a project can slow it down</i>	Adding resources to speed up a project really only works early in the project life cycle – or at least early in a project phase. Adding resources works against the productivity of existing team members as the knowledge transfer process takes place. Communication lines expand exponentially as team members are added, with the overall speed of the team being very much dictated by the speed of its slowest member.
<i>Taking resources away from a project can speed it up</i>	There is certain category of project team member who exhibits negative productivity.
<i>The more we measure change, the less change we will measure</i>	Poor change control, by itself, is often responsible for over half a project's schedule over-run. Knowing where change comes from, and being able to anticipate this change means decisions can be made well ahead of time to accommodate the likely impact of such change.
<i>Projects with contingency finish earlier than projects without contingency</i>	The fact that allowance has been made for the unknown (contingency) means there is an awareness of the impact of risk – and thus the need to control risk.
<i>Projects allowed to 'do their own thing' do the wrong thing</i>	A 'hands-off' attitude by senior management often leads to poor outcomes. For example, allowing technologists the freedom to run a project meant to deliver business benefits will often result in the opposite.

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## Chapter 3 – Life Cycles

***“It’s quite simple really: it’s got a start, a middle and an end.”***



### Introduction

All things must pass. Change is inevitable and a lot of ordered change can be described by way of life cycles.

Projects are no different. There are 3 different life cycles associated with a project:

1. *Product Life Cycles*
2. *Project Life Cycles*
3. *Project Management Life Cycle.*

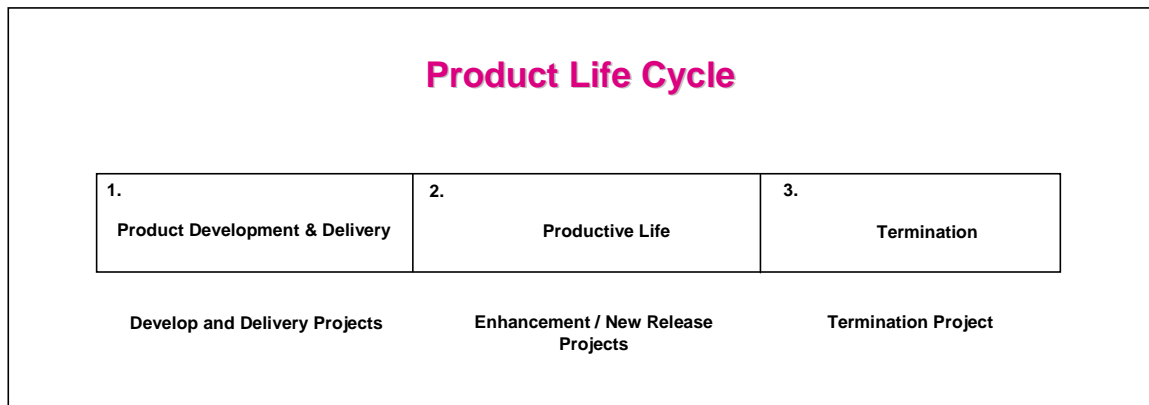
### Product Life Cycles

The ‘product’ is the asset or capital item (such as an Information System, Application, Network or a product to be marketed) which is delivered by the project. Some attributes of this asset are:

1. It will not last forever. At one point it will be withdrawn or replaced.
2. It will cost time, effort and dollars to support and maintain.
3. It will probably be subject to upgrades and enhancements.

The stages the product moves through from inception to termination are known as its *life cycle*. The anticipated length of time covered by this life cycle is critical to establishing the business case. Obviously, if the product can expect a productive life of no more than 5 years then there is little in

benefit in financing the project if the break-even point is beyond that. The following model is a simple representation of the main stages making up a product life cycle:



*Figure 3.1: The Stages making up a typical Product Life Cycle*

Note the logical association between the Product Life Cycle and Project Management is that the initial stage of Product Development and Delivery would be managed as either one or more projects. Similarly, during the ‘Productive Life’ stage, all new releases and enhancements would be handled as projects, but the day-to-day management of the product or system would typically be managed via Operations Management .

Another aspect of products is they are not static. They change to meet changing market conditions or to exploit opportunities. Each major product change or enhancement could be managed as a project and supported by its own business case.

The critical relationship between the Product Life Cycle and projects is that we use the project model to develop, implement, enhance and terminate products. In its most general sense, products and product changes are what the project delivers.

## Project Life Cycles

By definition, every project follows a flow of phases from initiation to completion. This flow of phases is known as the **Project Life Cycle**. Fundamental to effective management of projects is the definition and management of the Project Life Cycle.

The appropriate Project Life Cycle is dependent on the type of project and other factors such as time frames and constraints, resource availability, budget, risks and interdependencies with other projects. Project Life Cycles are derived or based on methods (also known as methodologies), such as:

1. Applications Development Method (for an IT project)
2. Product Development Method
3. Office Fit-out Method
4. Building Construction Method
5. Business & Strategic Planning Method

Obviously this list can be quite extensive. One common mistake is to think of a standard IT Life Cycle Method as the method. For large projects which are broken into sub-projects there may be multiple methods used (such as a Systems Development Method and a Product Development Method). Typically, a method contains the following:

1. The major Phases of the project.
2. A description of the key activities and tasks to be carried out (often represented as a Work Breakdown Structure).
3. A definition of what is to be produced during each Phase (also known as a Product Breakdown Structure).
4. Major milestones and sign-off points.
5. Roles and Responsibilities – ‘who’s doing what’.
6. Techniques which may be employed.

The following diagram shows a generic Project Life Cycle made up of 5 Phases:

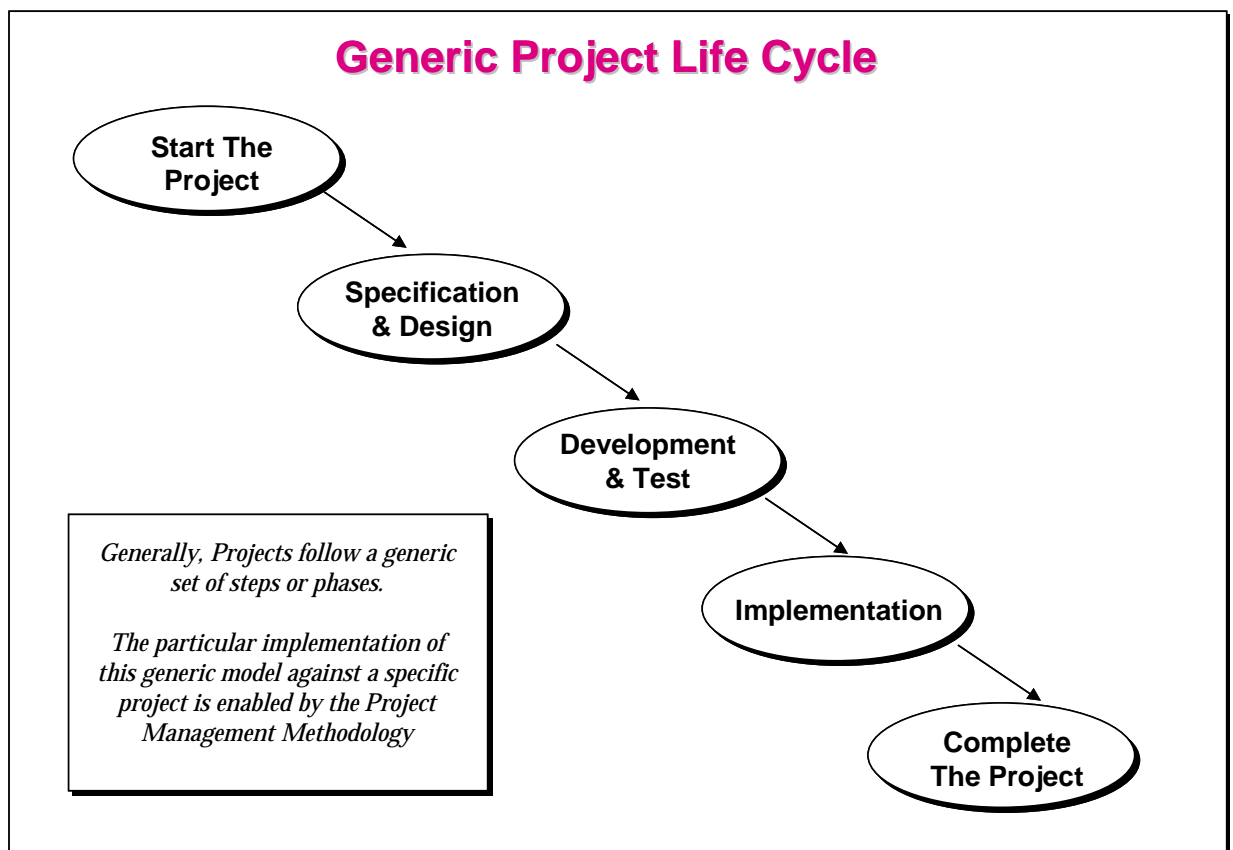


Figure 3.2: The Phases making up a generic Project Life Cycle

The reason it is called a ‘generic’ project life cycle is that it can be applied to many projects which deliver a ‘product’ of some description.

# Project Management Life Cycle

The third life cycle is the Project Management Life Cycle:

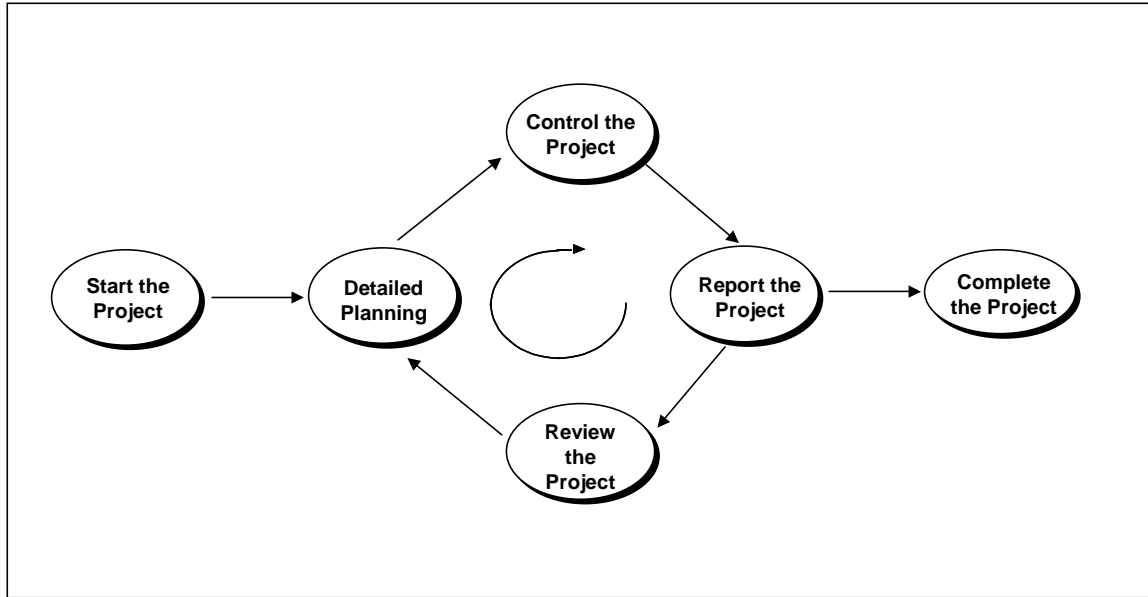


Figure 3.3: The major processes making up the Project Management Life Cycle

This is not a Life Cycle as such, but a representation of the major processes making up Project Management.

Traditionally the management processes were bundled in with the Project Life Cycle (PLC) method so that it was difficult to see what the project manager was responsible for as distinct from what the team members were meant to carry out. For example, some Systems Development Life Cycle methods include specific project management tasks (such as planning, resource allocation and risk assessment) buried within a project phase such as Analysis or Design. This often resulted in the specific management processes being missed or not done very well. One aspect of the above model is its simplicity – understanding what to do as a project manager is not difficult (although that cannot be said for actually doing it).

The major project management processes are:

Management Process	Description
<i>Start The Project</i>	Describes what to do to initiate a project with a very good chance of being successful. The major deliverable from this process is the <i>Project Initiation Report</i> .
<i>Detailed Planning</i>	This covers how to develop a project plan – not just a schedule. Planning is about understanding risks, resources, what is to be produced (deliverables) along with the Work Breakdown Structure (WBS), or detailed tasks.
<i>Control The Project</i>	Controlling is about measuring where the project is, assessing its performance and then applying small adjustments to keep the project on track. Radical changes in course normally indicate control is not being effectively applied.

Management Process	Description
<i>Report The Project</i>	Really this is simply a form of communication, but when used correctly Project Reporting can be a very effective method of getting key information to stakeholders.
<i>Review The Project</i>	Project reviews are about assessing the management aspects of the project with a view to implementing a set of improvements. This process often sets apart the competent from the best in class.
<i>Complete The Project</i>	This process defines how to go about finishing a project and carrying out post-project reviews to assess where lessons may be learned and to measure how well benefits were delivered.

It should be noted the immediate relationship between the Project Life Cycle and Management Life Cycle: the first and last Phases of the PLC are the same as the first and last Core Processes of the Management Life Cycle. The four middle processes of the Management Life Cycle (the ‘diamond’) are actually repeated for each Phase of the Project Life Cycle. This means that as each Phase is coming to a close, a review process is carried out before moving on to planning the next Phase. This is represented below:

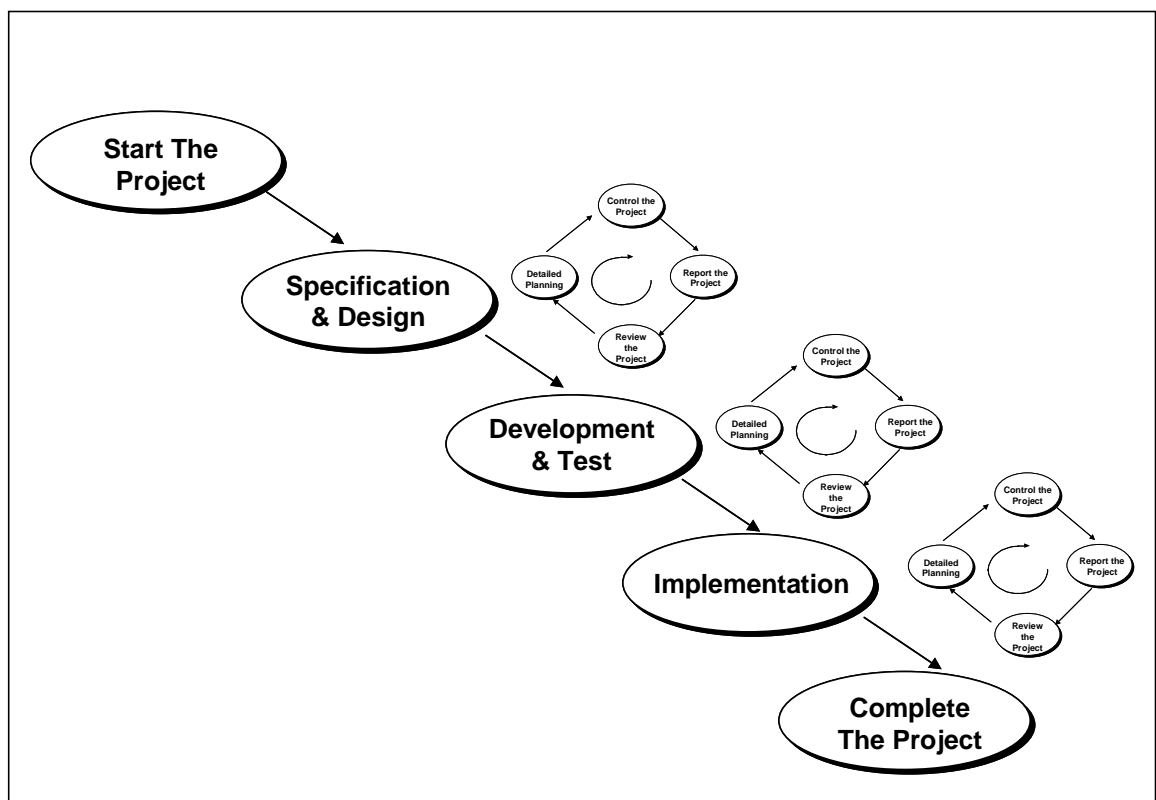


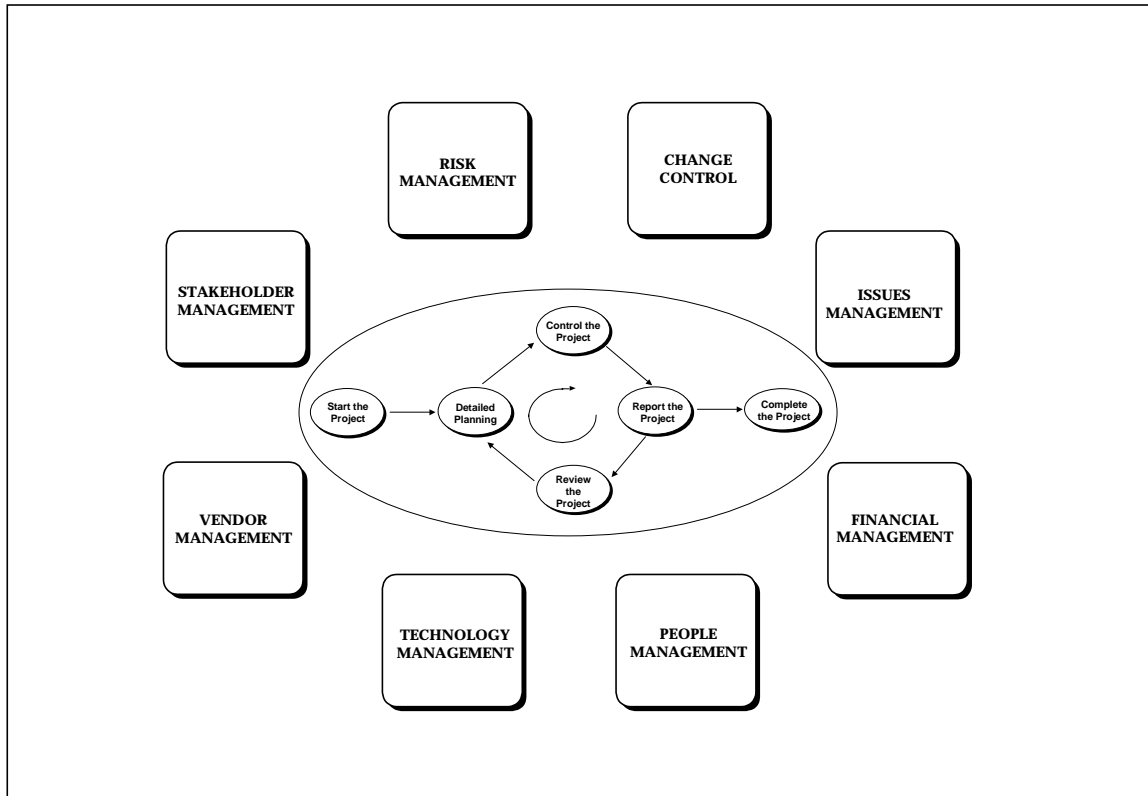
Figure 3.4: The management Life Cycle mapped on to the Project Life Cycle

Note that the first and last ‘phase’ of both the Project Life Cycle and the Management Life Cycle are the same: *Start The Project* and *Complete The Project*. The Management Processes in the ‘diamond’ – *Detailed Planning*, *Control The Project*, *Report The Project* and *Review The Project* – are repeated for each phase of the Project.

*One clear benefit of unbundling management activities from the Project Life Cycle is that the IPM can be applied to almost any project.*

## Project Management Procedures

Whereas the Project Management Life Cycle tends to map to a broad time frame (that is, there is an implied sequence in how the core processes are carried out), there are another set of practices which may be carried out right across the project. The IPM defines these as the Management Procedures, as shown below:



*Figure 3.5: The Management Procedures which support the Core Management Processes*

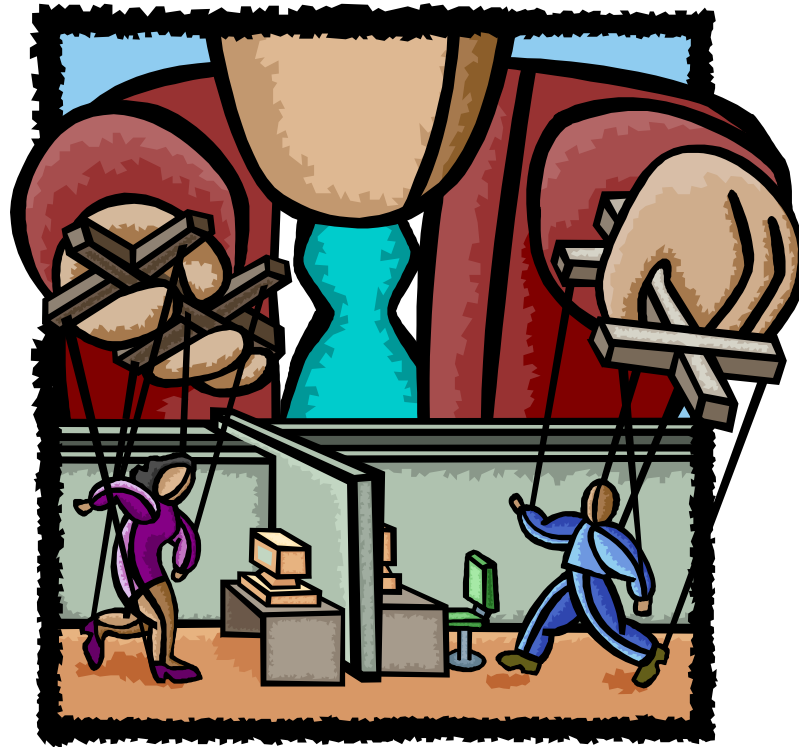
These eight procedures exist to ensure that the Core Processes are executed effectively thus ensuring project success. Another view is to describe them as the project’s ‘Support Systems’. Indeed, it is common to refer to the ‘Issues Management System’ and ‘Change Control System’ and the implementation of these procedures often involves an Information System. The following table gives a brief description of each procedure:

Procedure	Description
<i>Stakeholder Management</i>	The set of practices which support the effective management of all those individuals and groups who are involved with the project – either because they act in a governance capacity, provide services or support to the project, or who will be impacted by the changes brought about by the project.
<i>Risk Management</i>	It is considered excellent practice to manage risk right across the project life cycle. Excellent projects invariably have a well developed sense of ‘risk awareness’ – and balance management controls against the level of risk the project is exposed to.

<b>Procedure</b>	<b>Description</b>
<i>Change Control</i>	Also known as ‘Change Control System’, this procedure defines how the project scope is monitored and controlled against the demands for change. Projects without Change Control rarely meet agreed schedule or budgets.
<i>Issues Management</i>	Issues Management procedures define how to effectively log, resolve and monitor project issues. Uncontrolled issues normally work to drive a project out of control, thus indicating the importance of good issues management practice.
<i>Financial Management</i>	Project-specific financial management refers to the basis for initiating a project (its Cost Benefit position) and the set of practices used to set up and manage the project budget.
<i>People Management</i>	It is appropriate to elevate the practices used to define, hire and manage the project’s most critical resource – its people. In most organisations, HR policies are developed to such an extent that a lot of the procedures carried out here should be already in place.
<i>Technology Management</i>	This refers to the technology to be employed to support a successful project. This covers the desktops, software, communications and platform needs of the project.
<i>Vendor management</i>	These practices define how tenders are raised and evaluated, how contract negotiations are carried out and how vendors are managed, remunerated and their performance monitored.

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## Chapter 4 – Managing A Project



### Introduction

Managing a project is more about understanding the dynamics which influence how a project behaves than it is about following a predefined set of tasks. In fact, it is virtually impossible to manage a project by following a prescribed set of tasks. Projects do not behave in a repeatable fashion (although a key principle of good project control is to try and carry out as many repeatable tasks as possible), rather they behave dynamically - often behaving in a much more organic manner, responding to external influences and seemingly taking on a life of their own. So the IPM does not define detailed tasks that must be carried out in a sequential pattern, rather it provides principles, guidelines and approaches which, when applied judiciously and with awareness will result in a successfully managed project.

This chapter will cover the major project management processes from initiation through to completion.

## Starting The Project

### Key Principles:

1. Start as you mean to proceed: apply control from day one
2. Trust empowers: gain explicit support from the key players as early as possible
3. Understand the power of saying ‘I don’t know – but I can find out’
4. Don’t under-estimate – use metrics wherever possible
5. Only the Project Manager can make this project a success – it never ‘just happens’

So, how to get this show on the road?

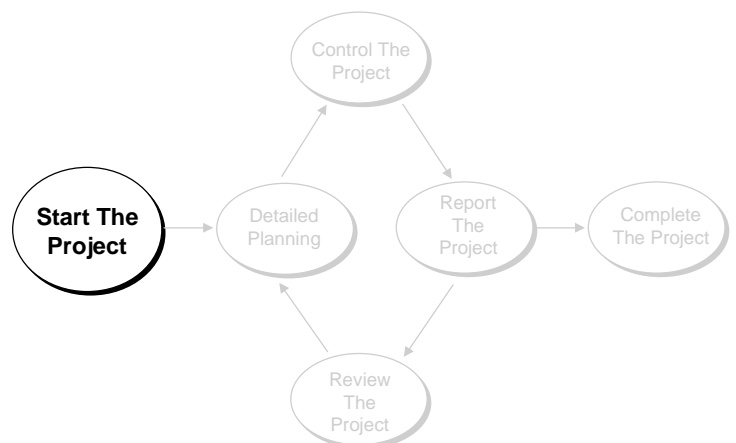
In some organisations, a ‘Master Schedule’ of all planned initiatives is drawn up as part of the business planning cycle. This means projects can be planned quite some time before they are actually kicked-off. In reality, this level of forward planning is rarely done effectively – or done such that it looks good on paper, but not in practice. Project metrics indicate that it is often the case that at any one time no more than 70% of what is contained in the Business Plan (and Master Schedule) is being carried out. The other 30% represents projects which were not on the Master Schedule, but are deemed important enough to start immediately.

In many cases, the trigger which initiates a project is opportunistic or a reaction to a significant force – such as ‘the competition is doing it so we had better catch up’. A good way to identify and initiate projects is to have a non-technology senior management group carry out the approval process. The focus on projects has to be the business – not how business is meant to fit in with technology.

The first of the Project Management Processes – *Start The Project* - is started.

The essence of *Start The Project* is to focus on the 5 ‘s’s’:

- ⇒ Set-up
- ⇒ Scope
- ⇒ Stakeholders
- ⇒ Structure
- ⇒ Strategy



## Set Up

Think of it like this – a project often operates as a mini-business, so the Set-up activity is really establishing the administration of the project. Establishing the project environment incorporates setting-up the PM's desktop:

1. Setting up project libraries and repositories.
2. Implementing the planning, scheduling and tracking tools.
3. Setting up the Change Log and Change Control Procedures.
4. Setting up the Issues Log and Issues Management Procedure.
5. Defining the Status and other Management reports.
6. Creating or updating the project metrics database and
7. Establishing a 'Communication Centre' (which may be a page on the *Projects* intranet site).

This may require something as simple as a 'cut and paste' of the organisation's standard project environment, or it may require setting up the environment from scratch. Most professional project managers carry their own 'workbench' which facilitates the establishment of this environment. IPM has a set of standard management tools which can be easily installed on a standard desktop.

Once a project is underway there is little opportunity to go back and establish a lot of house-keeping.

## Setting Scope and Stakeholders

In a lot of cases the major deliverable from **Start The Project** is the *Project Initiation Report*. This document will form the basis to proceed with this project (or not), and should contain:

1. a statement of scope
2. high level plan
3. who are the stakeholders
4. the interdependent projects
5. a definition of the overall budget
6. resource needs
7. responsibilities, and
8. how the project is to proceed.

The information required and level of detail undoubtedly depends on the nature of the project, but, in the main, significant detail is often required before approval is given to proceed.

The Project Manager should realise that time is very critical, so running workshops involving all the key players to gather data is a smart idea.

The Project Manager’s job at this point in the project may never be more important. On trial is the professionalism by which the project is being established and will probably be run. Key players in the organisation must be brought on-board at this time, and all commitments formally documented and endorsed. It is quite obvious really: no-one is going to be willingly associated with a project which is doomed. The corollary is also true: the more a project looks like being successful, the more chance buy-in will occur.

Quite often IT is an important player so a lot of time is taken to ensure the IT group has the capabilities to run their part of the project. This is an important issue: IT is not running this project – the business is. IT is the prime service provider to the project, but the project will be driven by business priorities and accountabilities.

However, IT is not the only important stakeholder. All the groups involved must be brought into the fold, with a definition of what their expected involvement is, as well as a clear definition of what their expectations of the project are. This information is packaged into the *Stakeholder Management Plan*, and is a key addendum to the *Project Initiation Report*.

### Structure The Project

Project structure describes how the project is to be broken into each of its component ‘sub-projects’ – each broadly aligned with a major area of responsibility. This structure is also aligned with the Governance Model – how the various management positions and groups are to be filled.

The model (at right) defines how the ‘end-to-end’ project is broken into its component projects:

In this example the overall project is broken into 3 sub-projects (the ‘IT Project’, the ‘Product Project’ and the ‘Implementation Project’). A Project Manager may be put in charge of each of these sub-projects, and the Project Manager may have a change of title to Project Director (really just to stop confusion). This depends on the size of the sub-projects – sometimes it’s the same person managing all sub-projects.

This also means that the structure of the project is aligned with Project Governance.

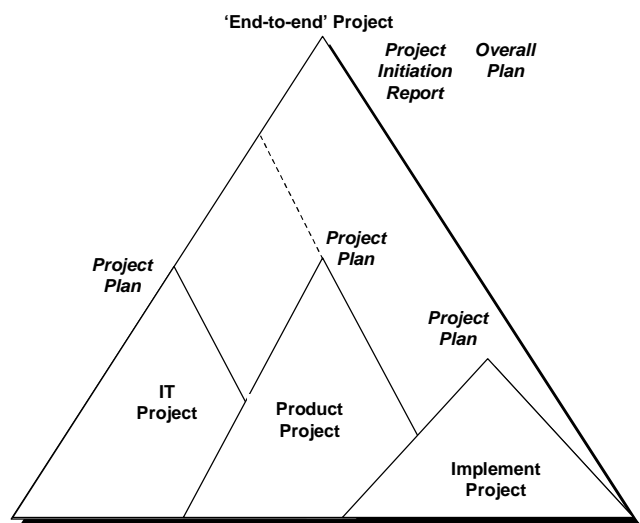


Figure 4.1: The component projects making up the ‘end-to-end project

It may well be the case that IT develops their own *Project Initiation Report* for their sub-project. This is an acceptable practice as long as it is clearly understood that the IT project is a sub-project of the ‘end-to-end’ project. The reality is that the IT sub-project may take on a life all of its own, and to the casual observer, there is no difference between the overall project and the IT sub-project.

## Project Governance

As mentioned above, the Governance model must correlate to the Project Structure:

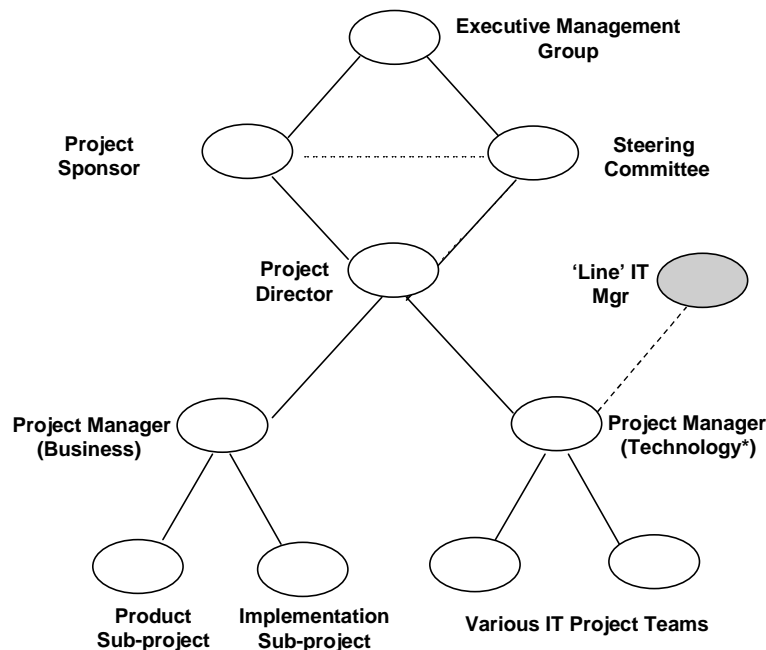


Figure 4.2 – A sample Project Governance Model showing reporting lines

In the above example, the Project Manager (Technology) reports to the Project Director for the purpose of this project, but still has line reporting responsibilities to IT management. This arrangement can cause confusion and tension if there is not a clear ‘customer – supplier’ relationship between the business and IT, and IT management have explicitly agreed to provide the technology services required by the project.

In a lot of organisations, there simply is not the maturity to make this sort of arrangement work with predictable results. Moreover, the accountabilities of those in key governance roles are often not understood or poorly carried. Studies have consistently identified that poorly understood and executed accountabilities of senior project players is the major contributor to project failure.

There is no exception to this basic rule: get project governance right!

## Strategy

Project Strategy is the high level ‘route map’ by which the project will proceed from initiation to successful conclusion. Relating to the discussion on ‘life cycles’ in Chapter 4, the strategy defines how the particular Project Life Cycle is to be applied to this project. The base PLC obviously depends on the nature of the project, but examples include:

- ◆ Product Development PLC (for a marketing project);
- ◆ An Application Development Method (for an IT systems development project);
- ◆ Office Relocation Method (for moving & fitting out a new office).

The example (below) is for a Product Development and Delivery Method and it shows 3 concurrent ‘streams’ – which are being handled as 3 sub-projects. High level estimation is carried out to determine the probable effort involved in each of the streams. A first-cut *Resource Plan* (which becomes part of the *Project Initiation Report*) defines what, and how many, resources are required.

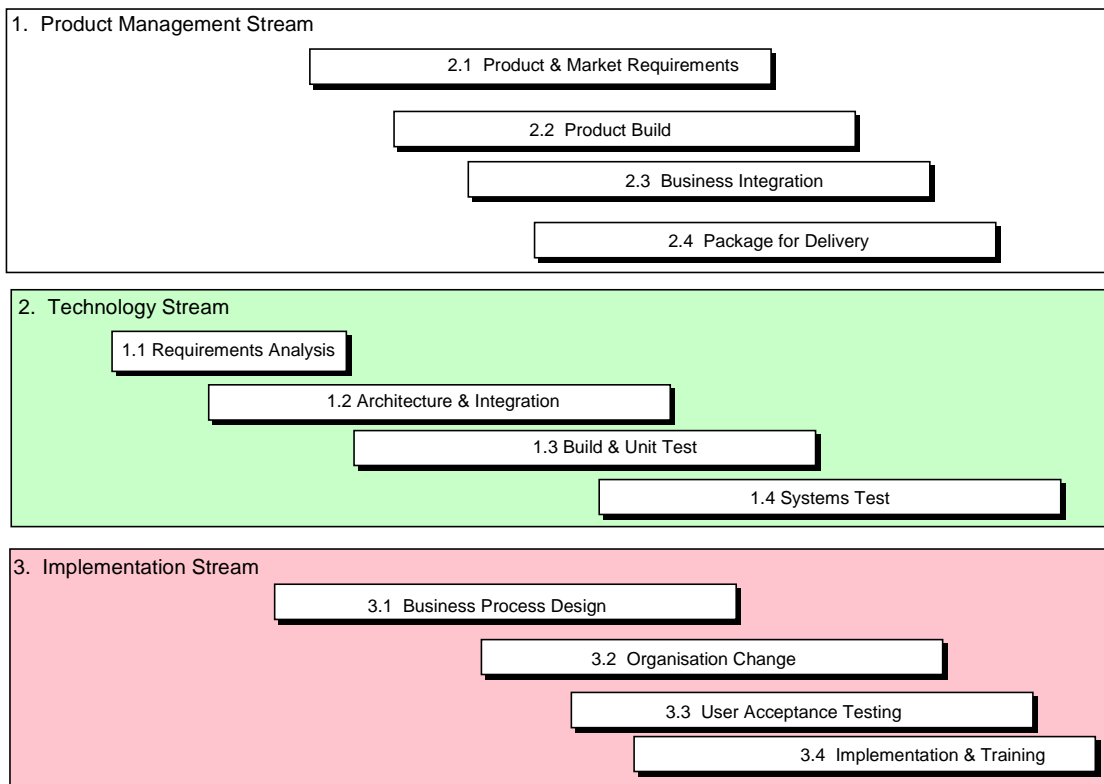


Figure 4.4 – The 3 project streams making up the ‘end-to-end’ project

This Strategy is mapped to a timeline as the first-cut view of the *Project Schedule*.

## Gaining Approval

Once the *Project Initiation Report* (and associated deliverables) have been produced, the Project Manager then embarks on a ‘sell job’ to gain support from the key players, and to make sure that the meeting of the Steering Committee to approve the PIR is a ‘done deal’. A good practice is to apply the maxim: ‘If you can’t delight them – don’t surprise them’. The PM works a delicate balance between ensuring all key stakeholders are very aware of their accountabilities with this project and not scaring them too much or taking them too far outside their comfort zones. Most importantly, the PM is working to engender trust in his or her professionalism and ability to deliver the goods.

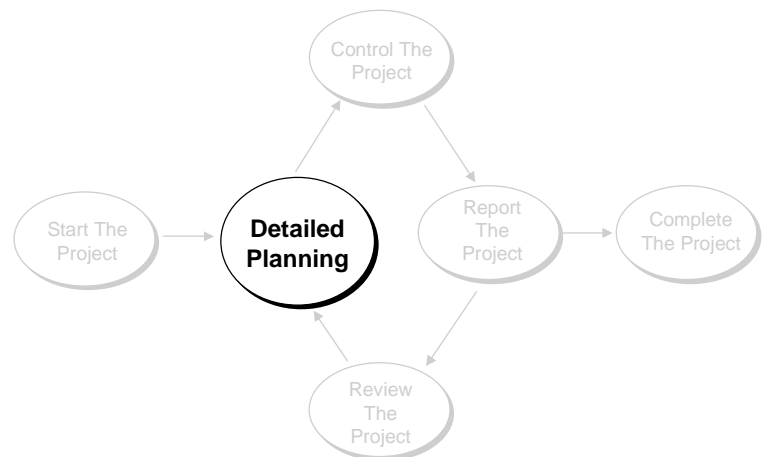
Once approval has been obtained, the project is ready to proceed on full throttle. But nothing should proceed without a good plan. At this point, the next project phase may be one called ‘Project Definition’ or ‘Business Case’, which is especially true for large or very complex projects. The purpose of this phase is to define a more detailed *Project Plan* and *Statement of Scope*. For smaller, less complex projects, enough work may already have been carried out to adequately define a good *Project Plan* as part of the *Project Initiation Report*.

## Detailed Planning

### Key Principles:

1. Planning is not an overhead. It saves time, cost, effort and face.
2. Use planning as an inclusive process to demonstrate your professionalism.
3. Always test your plan against assumptions – and reality.
4. Be risk aware: anything that may go wrong probably will unless you control risk.
5. Nothing is set in cement. Plan for change.

The Project Plan contained in the Project Initiation Report is useful, but it lacks the detail required to successfully manage the project. As outlined in *Chapter 3 – Life Cycles*, the core management processes of *Detailed Planning*, *Control The Project*, *Report The Project* & *Review The Project* are repeated for each sub-project and project phase within each sub-project.



Each of these Detailed Plans takes on the name of the sub-project or phase it refers to (such as the *Requirements Plan*, the *Build Plan*, the *Test Plan* etc). This form of ‘micro-planning’ is carried out for a number of reasons:

- ⇒ The initial *Project Plan* is too high a level to be fully descriptive.
- ⇒ It just is not possible to predict at a detailed level how a project is to perform too far into the future.
- ⇒ Change is going to happen. Scope will change, requirements will change, resources change, interdependencies will change. Building too much detail into a plan too far ahead is counter-productive in that there is a lot of wasted energy changing schedules.

A good ‘rule of thumb’ is that a Detailed Plan should be produced for a period of time not exceeding 3 to 4 months. So at this point, each Project Manager will develop a detailed plan of the next 1 or 2 project phases. As part of this planning process, detailed estimates are produced and, if there any major discrepancies with what is contained in the Project Plan then corrective action must be taken.

It is strongly recommended that the Project Manager continue with the approach adopted in *Start The Project* and use group work sessions to assist in the development of the Detailed Plan. This means gathering together the key players to iteratively develop the plan.

In the above example (see Figure 4.4), 3 detailed plans would be developed:

1. Product Development Plan
2. Implementation Plan
3. Technology Plan

Each of these plans will contain:

- ⇒ A concise definition of the objectives and key deliverables;
- ⇒ The detailed approach to be taken (the Methodology or Method);
- ⇒ The Method broken into its tasks and deliverables (expressed as a Work Breakdown Structure and product Breakdown Structure);
- ⇒ A statement of Roles and Responsibilities;
- ⇒ A definition of what other projects are in scope – and how these interdependencies are to be controlled;
- ⇒ A Risk Management Plan;
- ⇒ Estimates;
- ⇒ Resource Plan;
- ⇒ A budget;
- ⇒ A schedule;
- ⇒ Project milestones.

This list may either appear exhaustive or woefully inadequate – but remember that good project management is based on a set of principles; the application of this practice must be on a ‘fitness for purpose’ basis. Simple projects need a simpler project plan – in both content and detail.

The Project Plan is, in essence, a superset of these detailed plans.

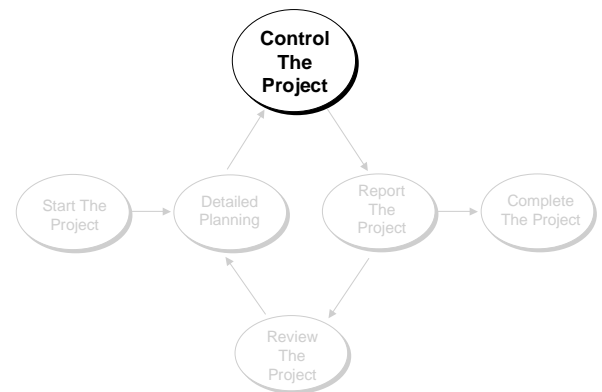
Considering that about 10% of the total project effort goes into developing and refining the Project Plan, the above plans would take approximately 2 weeks each to develop. This is never wasted effort – the value delivered by what is uncovered at this point is immeasurable in gained efficiencies downstream.

# Control The Project

## Key Principles:

1. Without effective control, the natural tendency is for a project to go out of control.
2. Continual adjustments to the project plan are better than a major re-plan.
3. Measure project performance – opinions are useless if the project fails.
4. Gain commitment at all levels of the project to deliver against time.
5. Know and explicitly control the critical path.

If the world never changed, projects would always stay on track. The essence of controlling a project is to control change – although to say that is all there is to it would be trite. Project control for many project managers working for (so-called) modern organisations is often a frustrating, demanding, exultant, depressing experience. To have a successful project, the project manager must have the authority to control the levers that control the project. It is highly desirable for the Project Sponsor to commit to the Project Manager to deliver whatever the Project Manager needs to make the project a success. Whereas these commitments are often made, a number of ‘ground rules’ should be established (listing just a few):



- ⇒ All Critical and High Issues will be resolved within 1 week of being raised;
- ⇒ All members of the Steering Committee explicitly commit to attend **all** SC meetings;
- ⇒ Critical business resources will be transferred to the project on a full-time basis;
- ⇒ The Project Manager is given discretionary spending approval (up to a certain \$ limit) to satisfy resourcing requirements.

For the Project Manager, ‘controlling up’ is just as important as ‘controlling down’, so continual and face-to-face communication with key stakeholders is critical. Project teams are encouraged to work together as much as possible, so all teams should be co-located.

An important factor determining how well projects proceed is productivity. There should be a strong focus throughout the project on work products – that is, what the project teams are producing and signing-off. Most projects tend to be activity-centric, concentrating on what people and teams are doing rather than what they are producing. This often results in ‘wheel-spinning’, or the impression that the project must be proceeding because of all the activity going on.

Another approach which may be introduced by the Project Manager is the *Work Assignment*. Each team member is allocated work on a rolling basis (either weekly or fortnightly), with the individual committing to having specified work products produced and signed-off within a given time. The Work Assignment covers a period typically between 1 and 4 weeks. This approach enables all project managers to accurately track project performance on a short cycle – such as weekly or fortnightly.

The Project Manager also sets up Issues and Change Registers, and all project members and stakeholders are familiar with the value in tracking both issues and changes. In mature organisations the Project Manager may gain approval for a Change Fund – essentially a budget and time allowance to cater for changes to scope. This is treated as a form of contingency, but it should not be mistaken with *contingency for risk* – often known as the ‘Management Reserve’. The project Manager should set up a Change Panel which meets to consider change requests and prioritises changes for approval by the Steering Committee. The Project Manager may also have authority to approve changes which cost less than 10% of what is remaining in the Change Fund.

Each team should meet on a weekly basis to track progress, resolve issues, communicate matters of concern and interest and make recommendations for improvement.

Project behaviour at the macro level is often a reflection of how the smallest component of the project behaves. Considering this ‘smallest component’ is the individual working on the project, if the individual exhibits control over their productivity and delivery then the overall project will stay on track. It is difficult to imagine a project being successful without each team member being successful.

## Report The Project

### Key Principles:

1. Good communication creates effective buy-in.
2. Use all available media to communicate effectively: e-mail, face-to-face, reports, communiqués and Web sites.
3. ALWAYS meet face-to-face with key stakeholders, such as the Sponsor. ‘If you can’t delight them – don’t surprise them!’.
4. Numbers are more persuasive than opinions: report the project’s performance measures.
5. Don’t leave the team in the dark – otherwise they will reciprocate.

Following on from *Control The Project*, the obvious next step is to communicate to all stakeholders and other interested or involved parties the status of the project and how well the project is performing against stated milestones, budget and expectations.

Good communication cannot be left out when considering what makes projects work. A good idea is to set up a ‘news page’ on the corporate intranet. In fact, if this concept is extended, the project could have a Web-site which provided access to the project repository where the project’s ‘Information System’ or ‘Knowledge Base’ resides. The browser provides an excellent method of access to the project knowledge base. Apart from good use of this technology, communication at the ‘face-to-face’ level is mandatory and the most effective way of communicating. It is truly amazing to observe the level of stakeholder management carried out over a coffee (or some other refreshment) away from the office.

Effective communication is effected both formally and informally. The formal (& normal) vehicle for communication is the *Status Report*. Whereas in many organisations these reports tend to be an opinion-based narrative, a more effective *Status Report* contains measures of how well a project is performing. The most common form of measure is the ‘Tracking Gantt’, but there are other performance indicators which can be reported:

- ⇒ Performance against the resource plan: do actual hours meet planned hours?
- ⇒ Milestones met;
- ⇒ Performance against budget (as measured by Earned Value Analysis);
- ⇒ Rate at which the Change Fund is being eaten up;
- ⇒ Rate at which issues are being resolved;
- ⇒ Quality indicators.

Depending on how the project is performing against each of the above indicators, a project manager can quickly identify where problems may be arising and can put forward suggestions for how remedial action could be taken.

The trick with these reports is to communicate as much useful and intuitive information in a couple of pages. No-one has the time to read volumes, so brevity is critical. Information transferred concisely and efficiently is the basis for modern communication.

In the case of the Web-distribution project, each team member produces a 1-page report on their individual progress, with each team reporting to the Project Manager who in turns produces a Status Report for distribution on a fortnightly basis. The Project Director synthesises these reports in a full Status Report for distribution to Steering Committee members every 2 weeks. It is worth noting that the Project Manager and Sponsor should sit and discuss the status of the project and content of the Report before distribution – and certainly before the Steering Committee meets.

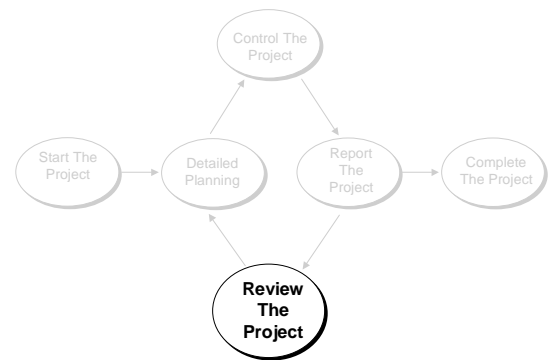
This Status Report is posted on the project's Web page.

## Review The Project

### Key Principles:

1. Improvements can, and should, be continually applied to managing the project.
2. Explicitly take the time to review performance before planning the next phase or sub-project.
3. Involve all team members in evaluating performance and shaping improvements.
4. Communicate to key stakeholders that improvements are being applied.

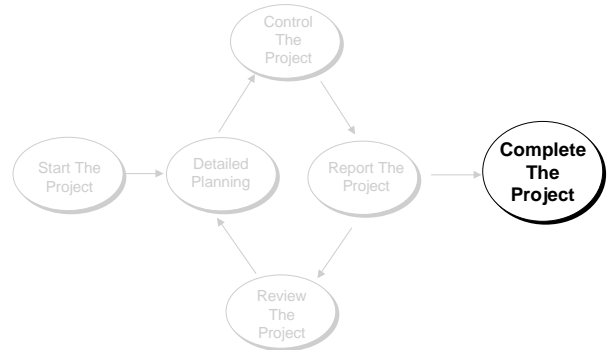
One activity separates good projects from excellent projects. Projects which carry out management reviews on a regular basis leading to changes in practice on a regular basis are typically excellent projects. It does not sound such a big deal – but improving practice and getting better at managing projects best occurs on an incremental basis, rather than a ‘big bang’ organisation change (although quite a few organisations attempt to revolutionise practice following a major disaster).



Project Reviews should not be confused with deliverable reviews (such as walkthrus). The reviews referred to here are carried out by each level in the project hierarchy, and typically are held towards the end of a phase, prior to a major milestone and after the project has been completed. In some cases these reviews act as a circuit-breaker if the project is running out of control, but where this practice is accepted, projects rarely move towards an out-of-control situation – a clear case of ‘if you don’t need it it’s because you’ve already got it’.

## Complete The Project

Projects finish. This fact is not to be confused with ‘Projects fade away’, ‘Projects are put on hold’, ‘Projects have all resources withdrawn’ and ‘Projects have all funding cut off’. ‘Projects finish’ means that the objectives have been met, key deliverables are in place, organisation change has been effected and the claimed benefits are measured and, if not realised, analysis is carried out to find out why and to ensure whatever mistakes have been made will not occur in the future.



Smart organisations treat *Complete The Project* as an opportunity to learn and get better. Dumb organisations either do not do it, or use this process as a witch hunt.

Essentially 2 main activities are carried out after the project has finished:

1. Complete and Terminate
2. Review & Improve.

### Complete and Terminate

This activity should be supported by the particular Project Life Cycle Method employed. Essentially the project manager is focused on closing off issues and ensuring the product or system meets all ‘exit criteria’ and ‘entry criteria’ for hand over to Product Support. The problems often encountered are ones of omission – in the haste to move on to the next project or release, a project manager tends to leave loose ends. The disciplined use of check lists goes some way towards addressing this lack of focus; the project manager may even appoint a ‘Completion Manager’ to ensure all criteria are being met. All judgements aside, someone who enjoys following process with a good eye for detail is suitable for this job.

### Review and Improve

This activity is the learning organisation at work. Formal reviews should be conducted and the results of the reviews presented to senior management. The tendency with a lot of organisational projects is to shy away from a close inspection of how the project performed, lest it shine too much light into too many rat holes. It comes as no surprise that organisations which fail to learn the lessons of failed projects are bound to repeat them<sup>1</sup>. These review sessions should be run for 3 separate groups:

1. The team and people working on the project
2. Service providers – such as IT, Finance, Legal, etc

<sup>1</sup> apologies to the author of the original quote which is so clumsily paraphrased.

### 3. Sponsor, client groups and key stakeholders

The purpose of these review sessions is to not dwell so much on what went wrong, but to identify ways to do things better. The sessions should be facilitated and run for (about) 2 hours. If appropriate (and agreed) a scoring system could be used to quantify the results of these feedback and discussion sessions.

A final report should be put to senior management (for corporate projects) and the project sponsor (for smaller projects) giving the results of the reviews and making firm recommendations for improvements. Some organisations coordinate these reviews and reports through the Project (or Program ) Office.

Adopt the mindset: every project is a source of ways for doing things better.

The other major type of review which is carried out concerns answering the question: “Did the project deliver the stated benefits as defined in the Business Case?” The supplementary question should be: “If not, why not and what are we going to do about it?” The Benefits Realisation Review is an absolutely critical activity which should be initiated by the Sponsor rather than the project manager – the reason being it’s the Sponsor’s benefits which are to be assessed.

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## Chapter 5 – IPM Contents



### IPM Contents

The Integrated Project Method is packaged as a set of processes, procedures, deliverables, check-lists and techniques as outlined in the following table:

<b>Component</b>	<b>Description</b>	<b>Format</b>
<i>Processes</i>	The following Processes are defined at a detailed 'step' level: <ol style="list-style-type: none"> <li>1. Start The Project</li> <li>2. Control The Project</li> <li>3. Report The Project</li> <li>4. Review The Project</li> <li>5. Complete The Project</li> </ol>	Each process is defined as a Word document
<i>Procedures</i>	The following Management Procedures are described at a detailed 'step' level:	Each procedure is defined as a Word document

<b>Component</b>	<b>Description</b>	<b>Format</b>
	<ol style="list-style-type: none"> <li>1. Stakeholder Management</li> <li>2. Risk Management</li> <li>3. Issues Management</li> <li>4. Change Control</li> <li>5. Financial Management</li> <li>6. Vendor Control</li> <li>7. Technology &amp; Resource Management</li> <li>8. People Management</li> </ol>	
<i>Deliverables</i>	<p>The following key management deliverables are defined:</p> <ol style="list-style-type: none"> <li>1. Benefits Realisation Review Report</li> <li>2. Business Case</li> <li>3. Change Control Register</li> <li>4. Change Control Request Form</li> <li>5. Detailed Project Plan</li> <li>6. High Level Project Plan</li> <li>7. Issues Register</li> <li>8. Key Milestones</li> <li>9. Project Initiation Report</li> <li>10. Project Interdependencies Plan</li> <li>11. Quality Plan</li> <li>12. Resource Plan</li> <li>13. Risk Management Plan</li> <li>14. Stakeholder Management Plan</li> <li>15. Statement of Scope</li> <li>16. Status Report</li> <li>17. Task Assignment</li> </ol>	<p>Each deliverable is defined as a Word document for:</p> <ol style="list-style-type: none"> <li>1. A template or pro-forma</li> <li>2. A sample document</li> </ol>
<i>Check-lists</i>	<p>A set of check-lists is provided to support review and sign-off activities:</p> <ol style="list-style-type: none"> <li>1. Project Initiation</li> <li>2. Project Plan &amp; Schedule</li> <li>3. Project Tracking</li> <li>4. Project Completion</li> </ol>	<p>Each check-list is defined as a Word document</p>

<b>Component</b>	<b>Description</b>	<b>Format</b>
<i>Techniques</i>	Techniques are applied with Management Processes: <ol style="list-style-type: none"><li>1. Estimation</li><li>2. Negotiation and Communication</li><li>3. Measuring Project Performance</li><li>4. Managing Group Work Sessions</li></ol>	Each technique is defined as a Word document and the Estimation and Measuring Project Performance Techniques are supported by Excel spreadsheets