

## Project planning & management

### Introduction

In all businesses it is necessary to plan, implement, manage and evaluate activities and processes. For some businesses, such as consultancies, designers, construction, etc, the work they do is entirely in the form of one-off projects. In all cases an individual will be responsible for planning, securing the resources, ensuring the work is carried out on time and evaluating the results. Too often projects are established with vague objectives, poor planning and inadequate resources. Project management requires careful planning and progress reviews. Spending time to plan a project in detail will be rewarded later – in all likelihood, the project will be implemented more smoothly and will require less time doing things that weren't foreseen.

The aim of this briefing paper is to introduce some project planning techniques which you may find useful.

Project planning is used when there is a definite start and end to an exercise. This approach helps ensure that almost nothing is forgotten because the process itself makes you take everything into account. Planning in this way gets things in the right order and ensures you can set a realistic deadline for the end of the job. A programme delivered on a continuous basis, such as a mentoring programme, can simply be regarded as a project without an end date. Broadly speaking, the objectives in any project planning method are:

- to determine all the activities required for successful completion;
- to determine the relationship between activities (that is, which activities are dependent on the completion of earlier activities) and which activities are independent and can, therefore, be undertaken in parallel (resources permitting);
- to identify the time required for each step; and,
- to consider the resources required.

### Project planning

#### Understanding the steps

Flowcharting can help you to think through all the elements of a particular activity. It might be intended, for example, to help write a quality assurance procedure or to manage a loan fund or to manage the delivery of services to members.

A flowchart is simply a model of a process, representing graphically that process and the often sequential steps within it. It should give assistance in reaching a common understanding of a process and thus provide a starting point to re-design it if required. Flow charts use standard symbols such as rectangular boxes for activities and diamond boxes for decisions. Generally the flow is down the page unless a decision takes the flow back to repeat an earlier activity. Software packages, such as Smart Draw, can make the production of flow charts very simple.

A carefully thought out flowchart can be used as the basis for preparing Gantt charts and critical path analyses..

Imagine, for example, that you are a graphic designer but also arrange printing for your design customers. You will need to:

- schedule your own work to meet clients' deadlines;
- order print;
- meet the printer's deadlines in order that they can meet your clients' delivery dates;
- check up on the print quality; and,
- chase progress.

### **The project plan**

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Once the steps are identified, it is essential to prepare a project planning document which sets out the objectives, analysis, strategy and specific schedules for the project. Producing the document will help you to refine plans and is a vehicle to ensure everyone understands what is expected of them. The planning stage is when most of the potential management problems should be anticipated and addressed.

Objectives must be very clear, specific, achievable and should relate to the wider business development strategy. Review objectives regularly; they may need to be changed, or the project abandoned, in the light of experience.

### **Project planning techniques**

Project management is simply about the detailed scheduling of tasks. This is particularly difficult when resources are scarce or have to be shared. To make things happen, people need to know what they have to do and when they have to do it. Accurate scheduling is also necessary in order to make sure that team members have carried out their tasks.

### **Task analysis chart**

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A task analysis chart can give you an "at a glance" picture of your project.

<b>Example: Task Analysis Chart</b>				
<b>No.</b>	<b>Task</b>	<b>Dependence</b>	<b>Deadline</b>	<b>Resources</b>
1.	Consult with members		31 Oct	Staff
2.	Undertake research	Task 1	31 Dec	Staff + donors
3.	Prepare draft proposals	Task 2	31 Jan	Staff + board

### **Gantt charts**

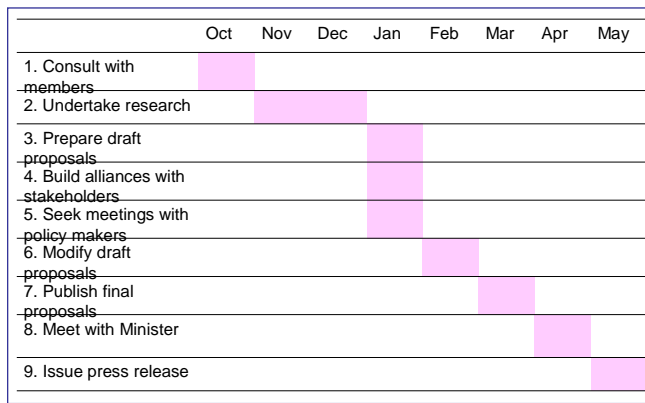
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A Gantt chart is a planning and scheduling chart originally devised by Henry Gantt. Such a chart provides a simple overview of a number of related activities and their expected durations for a particular project. Specifically, a Gantt Chart is a series of horizontal bars combined on a chart with each bar representing a specific activity and the length of the bar representing the time required. Imagine that you want to launch a new service writing bespoke computer software. The key steps might include:

- secondary market research;
- primary market research (amongst existing customers if already in business and amongst all potential customers for a new service);
- define the specific service to be offered;
- identify additional resources (such as staff, equipment, premises, etc); and,
- prepare a business plan for the new service.

You then estimate how long each of these steps will take and show them on a chart. Some activities can occur at the same time (resources permitting), but some

activities cannot start until others are complete (though these dependencies may not be obvious from the chart). For example, you cannot define the service accurately until you have completed the market research.



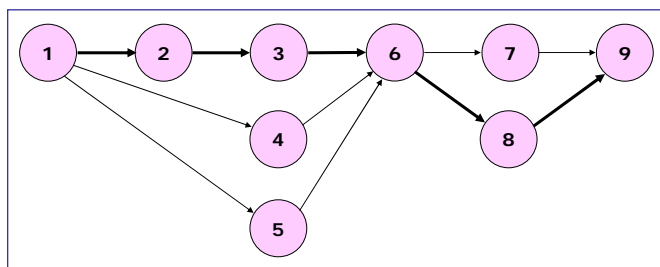
The way to start is simply to write down a list of all the things that have to be done, put them in a logical order and finally fill in a project planning sheet with estimates of how long each activity will take. To avoid delays, start long lead time activities as early as possible in the order of events.

There are several dedicated software packages such as

Microsoft Project which can help with the preparation of Gantt Charts, though for simple projects Excel is more than sufficient.

### Critical path analysis

In a *network* the planned activities are linked logically - to show the dependences. Networks provide a model of the overall activity which are not necessarily time dependent and which can be more difficult to understand than the Gantt chart. On the other hand, they can easily show which activities are dependent on others and which are critical.



It is important to differentiate between events and activities. An *activity* needs time whilst it is undertaken whereas an *event* is a milestone: a specific point in time such as the end of an activity. This may, of course, also be a signal for the next

activity to commence. The activities, together with their expected durations can be summarised graphically in a chart, known as a critical path analysis. Using this, it is possible to determine the critical activities; that is, the ones that, if delayed, will delay the entire project.

Computerised project planning software makes the preparation of critical path networks very easy. Most have the facility to add resource requirements. Critical path analyses can also be used to monitor progress and are easily amended if necessary.

### Event schedules

It is sometimes necessary to put together a meticulous plan for a specific day. Very few businesses can operate without having to organise some kind of an event. It may be to launch a new product, it may be a press call, it may be part of a package of work you are doing for a client. Whatever it is, it is crucial that everything runs smoothly if your customers are to believe that you are a professional outfit. On such occasions your company is on show.

Planning for the event should be done as a project plan, and the workloads programmed into the long-term schedule. In addition a master schedule for the event can be very useful. The schedule (running to no more than two pages) should summarise everything about the occasion. It should contain:

- an outline with specific times of everything that must be done during the day, and who will do it, from the first arrival to packing up and finishing;

- key events/moments (eg, “arrival of guests”, “presentation starts”, etc) incorporated into the schedule, with times;
- a list of everyone involved, including those you might have contracted in support, listing their responsibilities for the day;
- contact information (eg, organiser, venue manager, etc), and any other important facts or instructions you want to stress; and,
- it is often helpful to attach a map of the venue to the schedule.

Make up the schedule when you first plan out what will happen and update it as things develop, providing all those involved with a revised copy. Making up a master schedule is an excellent prompt to force you to think of everything, and is a useful document for future reference. Paper is kept to a minimum and you can be confident that everyone has been put in the picture and knows what they have to do. This is particularly useful if subcontractors (such as caterers, stage managers etc) do not live up to expectations. On the day of the event, the schedule serves as a handout for a team briefing session before the action starts.

### Monitoring progress

It is very important to monitor progress. The plan can be used to check regularly on what needs to be done and by when, and whether everything is going according to plan. The project planning sheet needs to be brought up to date regularly because plans always change. This way you can control the changes rather than the changes controlling you. You should specifically review both the timetable (have milestones been achieved?) and the actual expenditure and income (do a variance analysis). If there are problems with either, then you need to take corrective action.

Checklists are useful to be sure nothing has been overlooked. The project manager will have to keep track of both individual team members and their work and the critical areas of a project. Keep in touch with individual team members and hold regular meetings. Ensure meetings are to the point but be prepared to look at issues in depth, and to alter schedules, if problems do arise. Use the meeting as a real planning forum and act on the decisions taken. Meetings are a good place to check on individual workloads. Keep everyone informed about progress.

### Evaluation

When a project is completed, undertake an evaluation. Did the project achieve the expected outputs and outcomes? What was the impact of the project? If you made assumptions in your logic, were those assumptions justified? Most projects that fail do so, not because of lack of commitment or effort, but because there was a fault in the underlying assumptions. You should also record the lessons for the future by writing a (brief) report.

### Conclusion

Managing projects is not difficult. Take time to plan what you are doing. Whilst it may feel as though it is taking up too much time, it will save considerable time later. Make use of flow charts, Gantt charts and critical paths – they will all help you to organise your work efficiently and effectively