

# **THE PROJECT MANAGEMENT POCKETBOOK**

***2nd Edition***

By Keith Posner & Mike Applegarth

*Drawings by Phil Hailstone*

“Project management requires a multitude of skills – from vision and planning, to monitoring, communication, leadership and, of course, delivery.

This pocketbook pulls together best practice from these diverse areas into one simple, easy-to-read booklet. Refreshingly, it has been written from a general business perspective (rather than I.T.), and is therefore applicable to anyone managing change.”

**Adrian Guttridge, Vice President UK & Ireland, EDS**

“A lively guide based on real events that any of us may encounter in our everyday life at work or (as I found out after reading this) at home.”

**Johann de Waal, Director, International SOS Insurance Services Ltd**

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## SCOPING THE PROJECT

### THE 4 STAGES OF A PROJECT



**1.**  
**Set quality  
and quantity  
objectives**

Ideas,  
problems  
and issues  
to resolve

**2.**  
**Plan and  
schedule time  
and cost**

Feasibility  
of objective,  
specify  
outcome  
and plan  
everything  
you can

**3.**  
**Implement  
plan**

Action;  
delivery of  
the outcome  
specified

**4.**  
**Evaluate  
results of the  
project**

Take 'delivery' of  
project, correct any  
defects and learn  
lessons for next time  
(eg: What went well,  
what didn't go well  
and what would  
you change?)

## SCOPING THE PROJECT

### THE OUTCOMES APPROACH



An 'outcome' provides an objective measure that should not be open to misinterpretation. It removes subjective assessment and indicates clearly **all** the significant factors that determine success.

Quite simply, the project manager describes to the team members the **full** end result they will be assessed against before they get there. Contingency and 'what if' factors should be considered at the outset. For example:

- A sales manager is required to bring in £1 million of revenue; what if it costs him £500,000 in the process?
- A programmer is tasked with setting up a particular computer program by a set date; what if another program crashes as a result?
- A driver changes the car wheel and arrives safely at his destination; what if he had left the damaged wheel at the roadside or had damaged the car in the process?

Consider all the things you consciously look for but never openly express. **There should be no surprises for the team about what you are measuring!**

## SCOPING THE PROJECT

### SWOT ANALYSIS



Use **SWOT** to identify the conflicts and forces at work, both internal and external.

You will need to establish how things are now (the current situation) and also where you want them to be by the end of the project.

It is often said by experienced project managers that whilst internal strengths and weaknesses do not tend to change rapidly, external opportunities come and go **but** threats usually remain.



## SCOPING THE PROJECT

### SWOT ANALYSIS



#### Strengths/Weaknesses

These are always your own or your organisation's (internal) strengths and weaknesses. The following is a list of key aspects to consider:

- People/management expertise
- Facilities/building and equipment
- Technology
- Marketing/sales development skills
- Reputation/image
- Financial resources

#### Opportunities/Threats

External factors can cause your project to fail if you don't consider all the 'what ifs'. The following factors will affect how you approach the project, allowing you to be better informed at the planning stage:

- Political/social/economic changes
- Competition, locally or even nationally
- Market size and trends
- Profitability of market
- Needs that your products fulfil
- Likelihood of these needs changing

## SCOPING THE PROJECT

### PESTLE ANALYSIS



PESTLE analysis should be used in conjunction with a SWOT analysis when examining the potential for Opportunities and/or Threats. It is a mnemonic to draw attention to those factors external to you, or the organisation, that may be perceived as positive or negative. Originally referred to as the PEST analysis, it has been brought up-to-date to reflect the explicit inclusion of more modern-day influences.

**P**olitical – the political influences on a company or project, eg: impact of changes in government, political lobbying, or even in-company politics.

**E**conomical – those economic and financial influences on a company or project, eg: profit, margins, exchange rates, euro issues, inflation, recession, unemployment, local, regional or national economy.

## SCOPING THE PROJECT

### PESTLE ANALYSIS



**S**ocial – those social influences on a company or project, eg: demography of markets or skills availability, local community, sponsorship, working hours, school projects and charities.

**T**echnological – those influences new technologies have on a company or project, eg: systems, equipment, research & development, innovation, communication with markets and suppliers, accessibility.

**L**egislative – the impact of new laws and regulations on a company or project, eg: local authority regulations, national laws, EU and World Trade directives.

**E**nvironmental – the influences on a company or project that affect the environment, eg: disposal of waste, use of natural resources, pollution, environmental lobbying, eco-friendly policy, ISO 14000.



## SCOPING THE PROJECT

### THE NATURE OF ANY PROJECT



No project is like another; there are different objectives, skills, people and resources available. Since the advent of business process engineering, downsizing, etc, projects have had to come up with quicker, more effective solutions to problems. For instance, all of us have to reduce the time a product takes to get to market or speed up the response time to customers.

As a basis for information gathering think **SQID** when approaching any project. See, for example, how it applies to acquiring a new computer system:

**S**peed of response to customer enquiries and requirements

How quickly do we need the computer system? How will it speed up our service?

**Q**uality of product and advice

Why do we want the new system? What must it be able to do? What must it be compatible with?

**I**nformation must be able to be fed in and should cross traditional functional boundaries without difficulties

Will we be able to use the new system the moment it arrives? What are the consequences of mistakes being made during the changeover? How are the desired outcomes expressed to the contractor?

**D**elivery time to the customer or to the next link in the supply chain must be the shortest necessary to complete the job

Is there a learning curve to experience and, if so, for how long? If we use a contractor to set us up, when could the job be done and what support will be available?

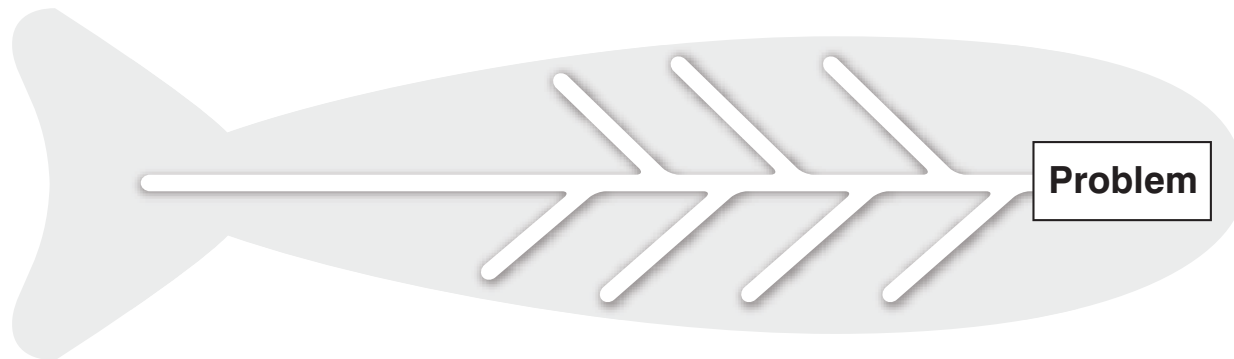
## SCOPING THE PROJECT

# FISHBONE DIAGRAMS

## CAUSE & EFFECT



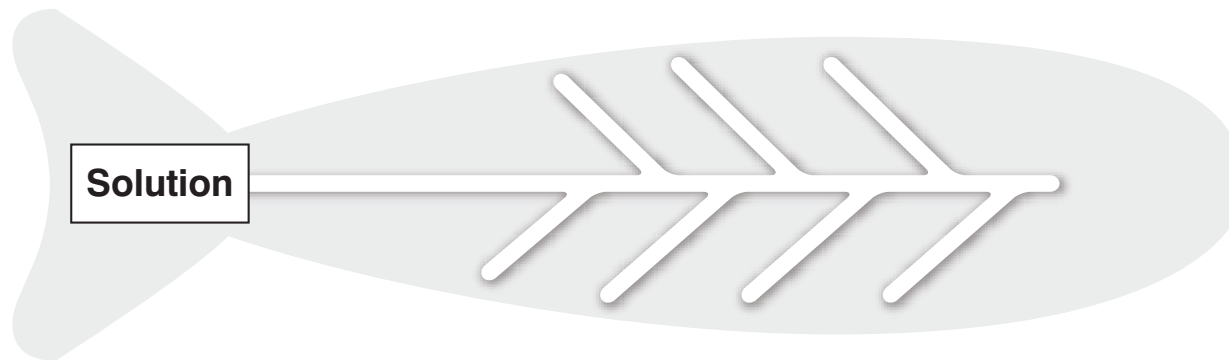
Talking of SQID, why not try out a Fishbone diagram to link together all the issues that have a bearing on the problem? Define the problem in the head box at the right hand side and add a bone to the left for each of the contributing factors. These could, for example, be the 5Ms (see page 53), 7Ss (see page 107) or later parts of the process.



SCOPING THE PROJECT

## FISHBONE DIAGRAMS

SOLUTION IMPACT



Alternatively, place the focus in the tail end to explore the effect of a solution or idea on areas labelled on the skeleton. Each larger bone could have smaller splinters attached as sub-headings of the broader label. Here it's the knock-on effect we are looking at.

## SCOPING THE PROJECT

# SCOPING MEASURES

## EXAMPLE



Imagine a project where you and three colleagues have to travel from London to deliver a sales presentation in Brussels. How will you go about it, bearing in mind constraints of time, cost, quality and quantity?

### Travel

- Clearly, you can go to Brussels from London by many means.
- If time is no object, then walk or go by bike.
- If money is not constrained, go by Eurostar train, first class, or by plane.
- If you need to work during travel time, then take the train or ferry.
- Can you get there and back in a day?
- How much luggage do you have to carry?

### Accommodation

- How close to the meeting place do you have to be (10 mins or 1 hr)?
- Do the four of you have to be together?
- Will you only need bed & breakfast?
- Is accommodation required before or after the presentation?

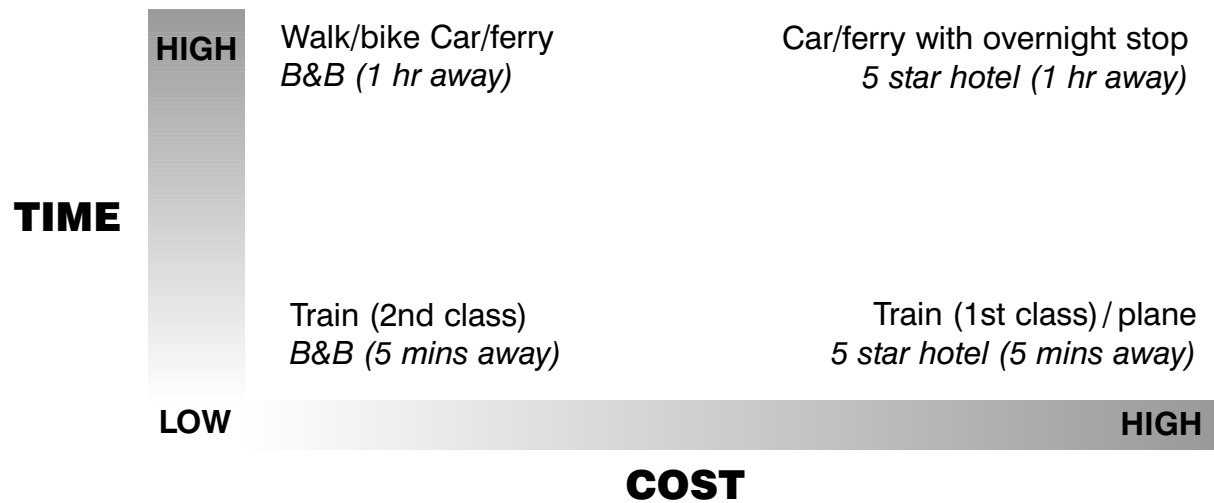
## SCOPING THE PROJECT



## SCOPING MEASURES

### EXAMPLE (Cont'd)

Continuing our example of the visit to Brussels, let's analyse time factors versus cost factors:



## About the Authors

**Mike Applegarth** has been a training professional for over 25 years, with more than 20 of those spent as a consultant. His assignments have involved him in projects within a range of industries from insurance to petrochemicals, and his clients are within the private and public sectors and amongst charitable institutions.

Aside from leadership and sales training, Mike trains in project management and has helped organisations identify their own processes and documentation appropriate to all scales of project. In particular, participants learn just how much the day job benefits from scoping, planning, implementing and evaluating.

He is the author of 'How To Take A Training Audit' (as a leader in the Kogan Page Practical Trainer Series) and, with Keith Posner, he has written two other pocketbooks on empowerment and call centre customer care. 'Leading Empowerment: A Practical Guide to Change' is his latest work, published by Chandos.

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**Keith Posner** LLB Hons, FCIPD ACIM. Keith began his professional training career over 20 years ago at Nationwide Building Society. He then joined Allianz Cornhill Insurance and managed the specialist training function on their business process re-engineering project team.

Keith and his wife Sian formed Positive Perspective in 1995. Their team of consultants specialise in one-to-one executive coaching, and designing and delivering a wide range of individually tailored training programmes, including: Business Planning and Project Management, Stress Management, Life Balance, Leadership & Motivation, Selling & Negotiation Skills, Management of Change, Team Building, Career Development Centres and Communication & Empowerment.

Positive Perspective's client base includes managing directors, partners and senior managers from prominent global and national companies, notably within the utilities, financial and service sectors. With Mike Applegarth he has written two other pocketbooks, on empowerment and call centre customer care.

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