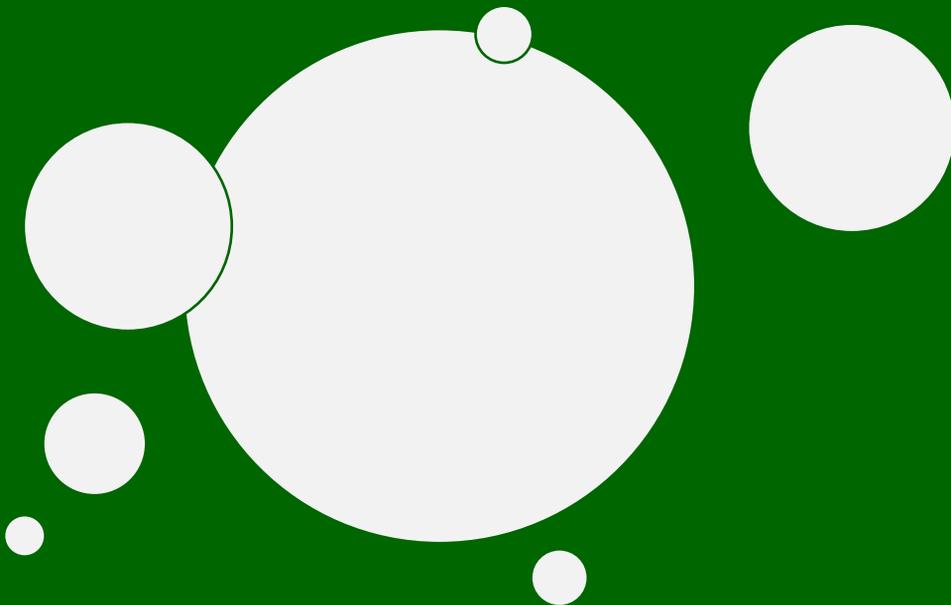


IMPROVE YOUR MANAGEMENT OF PROJECTS

CHECKLIST

Actions that can be implemented to improve your overall projects and job management.



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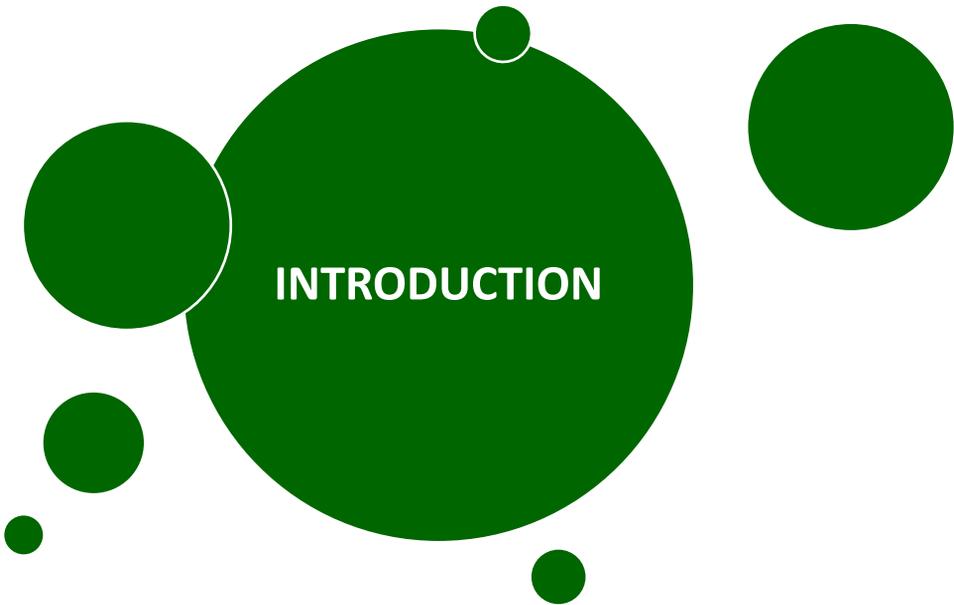
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INTRODUCTION

Are projects what you do? For yourself or others. If they are central to your business they are the biggest factor in how well your company performs.

This checklist is intended to act as a guide to help improve how you manage your projects. Highlighting some areas and actions that will help improve decision making and the management process, reducing time and helping deliver successful projects.

WHY IMPROVE YOUR MANAGEMENT OF PROJECTS?

Improving the project management improves the successful delivery of benefits for the company, its clients and employees.

Improvements though have to work at a business and project level, for the benefits to be fully realised.

If a project doesn't deliver what the business needs the business won't benefit. If you try and run the project how the business wants the project will fail.

To maximise benefits the business needs to be at the centre of everything while allowing the project and business as usual to function.



.ABOUT THIS CHECKLIST

The checklist is organised into general management areas and then some key project actions highlighted for each area.

In each section there is a brief explanation of each general management area.

Then each management area has been split into business and project actions to enable maximum benefits.

All of these actions do not need to be complicated and should be implemented within your current means and resources initially.

It has sometimes been necessary for efficiency to use what might be considered 'jargon'. There is a glossary at the end to help.

This checklist is a guide only, any improvements need to be considered within the means of the company and as an overall plan. As with any change, improvements should be measured and monitored and professional guidance sought to help implement them.

THE PROJECT ACTION CIRCLE



The project action circle illustrates the key management categories within a project.

It acts as a generic checklist for roles and responsibilities required within a project. As no projects are ever the same and no businesses are ever the same. There is no one fit all solution. Any processes, actions and improvements need to be tailored from the project circle.

Each category should be analysed for each project and an accountable person, decision maker and doer assigned. This will allow all aspects of a project to be managed.



**CHECK
LIST**

MANAGEMENT CONTROL OF PROJECTS

This area focuses on the internal management, process and decision making within the project environment. This is key to reducing time wasted, by implementing repeatable processes that will fit all projects and allowing accountability, leadership and direction.

BUSINESS LEVEL



- Is there a company structure in place that illustrates governance and responsibilities?
- Do you have an outline project process documented with defined stages?
- Do senior management align the project process with company strategies and goals from the start?
- Is there a repeatable procurement process in place?
- Do you have a learning plan in place that aligns with the companies needs?

PROJECT LEVEL



- Is the company project process tailored to the project from the start?
- Are roles and responsibilities assigned and reviewed for all project management areas at the start and during the project?
- Is there an outline project plan in place that everyone can understand?
- Are there project meetings in place to both review and improve the project process?
- Can the project quickly supply a report highlighting the project status and issues?

BENEFIT MANAGEMENT

Benefits management focuses on the reasons for the project and how they are defined, measured and delivered. This is key to focusing decisions, to reduce time and costs wasted by indecision or wrong decisions.

BUSINESS LEVEL



- Are all projects recorded and the impact on the company understood?
- Are the perceived benefits to the company from a project recorded at the start of a project?
- Are the reasons for doing the project communicated to all stakeholders?
- Is there a change reporting process in place to senior management?
- Is there a centrally managed usable information storage system in place?

PROJECT LEVEL



- Is there a simple project specific business case for each project produced at the start of the project for all to see?
- Are risks recorded with a potential benefit impact?
- Are the benefits of the project to the company communicated to all the project team regularly?
- Are the project benefits reviewed and assessed at set intervals?
- Is there a project issue log for each project recording issues, actions and resolutions?

STAKEHOLDER MANAGEMENT

Stakeholder management focuses on how you engage with all parties that have an interest in the project. Both client, internal and suppliers.

Improving this area increases trust, understanding and reduces time spent communicating both information and decisions. Allowing accurate information and reducing wasted time.

BUSINESS LEVEL

- Are all those effected by the company informed of new projects and why those projects are important?
- Are senior management decisions and priorities communicated in a consistent way?
- Are those relevant parties analysed to ensure there are non missing and still relevant?
- Is there a marketing plan in place to communicate company progress?
- Is there a research system in place to engage external knowledge and help when needed?

PROJECT LEVEL

- Is there a simple communication plan in place outlining who is responsible for communicating to who?
- Does the communication plan also include decision making?
- Is the communication plan regularly reviewed and updated during the course of a project. With all parties informed?
- Are issues assigned to both a specific actioner and actioner?
- Is missing information analysed early and the right source for that information targeted?

FINANCIAL MANAGEMENT

Financial management is all about how the costs are managed. How they link to the business and value is recognised. Improvement in this area is the foundation to ensuring profit and clarity on the business and projects position.

BUSINESS LEVEL

- Are all benefits recognised as measurable?
- Are all new projects assessed against the companies strategies, goals and investment approach?
- Are the project benefits, both current and impending, recognised and collated in a single central location?
- Is there a standard transparent project invoicing process in place?
- Are all project transactions both real, impending and predicted recorded in one location?

PROJECT LEVEL

- Does the business case include quantitative benefits being identified?
- Is the project tailored to fit the financial priorities of the project?
- Are project risks assessed with a quantitative benefits value identified?
- Are finance included in the project reporting?
- Is there a process in place for recording, updating and finding project spend?

RESOURCE MANAGEMENT

This area focuses on how you deal with all the things that are needed to do the projects. From staff to infrastructure. Improving this will ensure that you have the right things in the right place at the right times to reduce lost time or repeating work.

BUSINESS LEVEL



- Is there a central responsible point for all project resource requirements?
- Is there one centrally monitored resource plan for all projects?
- Are all external resources considered and recorded within the central procurement process?
- Are resources considered and managed as part of a coherent change process?
- Are ongoing skills and training that will benefit the company integrated into the resource planning?

PROJECT LEVEL



- Are required resources and skills identified and highlighted for potential projects from a singular central point?
- Are projects assessed against required and available skills in the business case for the project?
- Has each project its own outline plan with resources integrated?
- Is the project management process tailored to fit the resources required and available to deliver the project?
- Is there a flexible solution to resource flux allowed for each project?

ORGANISATIONAL MANAGEMENT

Organisational management is all about governance / decision making being aligned with strategy and goals. Also it considers the external factors influencing the business or project. Improvement will focus the projects to the business needs so ensuring the business gets what it needs from the project and not waste time and money on things that will not benefit it.

BUSINESS LEVEL



- Is business central to all decisions related to projects?
- Is there a set of company strategies and goals identified aligned with the projects selected?
- Are external business factors considered as part of the project selection arrangements?
- Is the complexity considered and limited within the portfolio of projects?
- Are business decisions centralised and transparent to all projects to enable project decisions?

PROJECT LEVEL



- Do all projects have documentation showing alignment with the business requirements?
- Is there a simple quantifiable project reporting system in place?
- Is there a standard measurement process for the level of project decision that needs escalating?
- Are key stakeholders identified as part of the decision making process on each project?
- Are decision making responsibilities integrated into the communication plan?

RISK MANAGEMENT

The management of risk is not just about negative factors but also possible gains. Its management focuses on the triggers that could potentially reduce or increase the benefits the company will receive from the project. Often this is financial but also in relationships and performance.

BUSINESS LEVEL



- Is there a consistent approach to highlight threats and opportunities?
- Is there a consistent approach to mitigate risk?
- Are all projects assessed with associated risk levels and the portfolio balanced?
- Is project complexity measured and consistently rated?
- Does the company actively search and allow for opportunities to be exploited?

PROJECT LEVEL



- Does each project have potential risks documented and tailored to the project?
- Are all generic risks considered and mitigated as part of a standard project process?
- Does each project have a documented risk plan agreed with the business at the start of the project?
- Are project specific risks highlighted to all stakeholders?
- Is there an information plan in place outlining both received and required information?

ABOUT COWSHED PROJECTS

Cowshed projects is a project management service that works on projects and supports you to also improve your management of projects and get the full benefits - when it is needed.

It can offer a variety of solutions to meet your business needs including managing projects, supporting your project management team or performing an assessment to help you improve your management of projects yourself.

Cowshed projects specialises in working with smaller to medium sized business in fit out, bespoke manufacture, development and design in the north of England

To find out more and how I can help your business get the full benefits from your projects contact

info@cowshedprojects.com

Or visit

www.cowshedprojects.com

GLOSSARY

Sometimes it is necessary to use industry 'jargon' to describe things efficiently. Here are some common terms explained:

Accountability

Personal answerability. This can not be delegated like responsibility.

Assurance

All the systematic actions necessary to provide confidence and certainty that the target is appropriate and being conducted appropriately.

Benefit

A measurable improvement resulting in an outcome that is perceived as an advantage.

Business case

The justification for an activity (project). It will have a common approach for all activities and be tailored to the companies needs to assess the activity fully.

KPI

Key Performance Indicator, a measure of performance that is used to define and evaluate how successful something is in making progress towards and objective.

Management

The process of dealing with or controlling things or people

PM Maturity

Project management maturity refers to the progressive development of an enterprise-wide project management approach, methodology, strategy, and decision-making process. The appropriate level of maturity will vary for each organization based on its specific goals, strategies, resource capabilities, scope, and needs.

Process

A series of actions to accomplish a specific objective and create an output.

Profit

An advantage or benefit gained by achieving more from the output than input.

Quantitative

Measurable by the numeric quantity of an element rather than being subjective.

Resource

An organisations physical or virtual entities that are of limited availability. They can be human or otherwise.

Risk

An uncertain events that should it occur will have an effect on the achievement of the project. This can be positive or negative and for events that have not happened. Unlike an issue which is an event that has or will happen.

Stakeholder

An individual, Group or organisation that can affect, be affected by, or perceive itself to be affected by an initiative/project. This can be a user or supplier.

Tailored

Adapting a method or process to suit the situation in which it will be used.

Value

How good or useful something is in relation to its cost.