



This is a sample chapter of **Deliver That Project**. (You can obtain a full copy of the e-book at <http://www.deliverthatproject.com/main.html> ). Nothing has been added or taken away from this chapter. What you see here, is what you see in the full version of **Deliver That Project!**

In providing you with this chapter, I hope you can see:

- the style of the book
- the practical approach taken by Project Agency
- that you can use the book to help you work through one or more of your projects
- there are opportunities to identify learning in the unique section LEARNING ZONE  , simple and beneficial

Do please share this with your colleagues and do direct them to <http://deliverthatproject.com/main.html>

The first chapter of the book covers the introduction to the book, the written project management system, when to use it and also covers developing an effective business case. I recognise that not everyone is involved in the preparation, and writing business cases. However, this topic is important for some people and is to be used for its content as much as its illustration of what the rest of the book looks like – see the table of contents at pages 3 and 4.

Someone commented that ; *"I appreciate articles like this, as I sometimes think people make PM out to be something more complicated than it actually is by using complex acronyms and the likes!"* This was response posted to an article I wrote on The Association of Project management web site. This is how I write and my hope is that you will see this throughout this book.

**Look at the end of the book for copies of testimonials.**

I am more than happy to answer any questions you may have, e-mail me [ron@projectagency.com](mailto:ron@projectagency.com)

Good luck with all your projects

A handwritten signature in black ink that reads "Ron Rosenhead". The signature is written in a cursive style with a long horizontal line extending from the end.

Ron Rosenhead



# **Deliver That Project**

**A practical step-by-step  
training guide**



**Ron Rosenhead  
Project Agency**

<b>1</b>	<b>Introduction.....</b>	<b>5</b>
<b>2</b>	<b>How this book works .....</b>	<b>6</b>
<b>3</b>	<b>Setting the scene.....</b>	<b>6</b>
<b>4</b>	<b>When do you use the project management system .....</b>	<b>7</b>
<b>5</b>	<b>The Five Stages .....</b>	<b>8</b>
<b>6</b>	<b>Set-up Initiation .....</b>	<b>9</b>
	Why are you doing this project ? .....	10
	Business Case Form .....	11
	Business Case for STINT .....	13
	🔗 Activity 1 Writing your own Business Case.....	14
<b>7</b>	<b>Set-up:Definition .....</b>	<b>16</b>
	Having clear project roles .....	17
	🔗 Activity 2 Having clear project roles.....	18
	🔗 Activity 3 Agreeing levels of authority for your project.....	19
	Roles Chart – Who is responsible for what .....	20
	Developing a clear and agreed project definition.....	22
	A completed project definition – PID .....	23
	🔗 Activity 4 Writing your own PID .....	25
	Stakeholder Management .....	28
	Stakeholder Analysis .....	29
	🔗 Activity 5 Your own stakeholder map .....	30
	Developing a Risk Register .....	31
	Risk Analysis .....	31
	🔗 Activity 6 Developing a risk register for your project .....	32
	Some Quick Tips.....	33
	🔗 Activity 7 Quality, Cost or Time? .....	33
	🔗 Activity 8 An initial monitoring system for your project .....	34
<b>8</b>	<b>Delivery Planning.....</b>	<b>36</b>
	Work breakdown structure (WBS).....	37
	Developing a WBS for the STINT project .....	38
	Work Breakdown Structure for Administration – Stage 1 .....	39
	Work Breakdown Structure for Administration – Stage 2 .....	39
	Activity 9 Developing your own WBS .....	40
	Producing realistic estimates of time and cost .....	40
	🔗 Activity 10 Estimating and identifying predecessors.....	41

## Deliver That Project

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Milestone charts.....	41
Gantt charts.....	41
Sample Gantt chart for part of STINT project .....	42
☞ Activity 11 Developing a Gantt Chart .....	42
Critical Path Analysis.....	43
☞ Activity 12 Identify the critical path .....	44
Project Communication .....	45
Communications plan for STINT project .....	45
☞ Activity 13 Developing your communications plan .....	46
<b>9 Delivery (monitoring and control) .....</b>	<b>47</b>
Loose develop Tight control .....	48
Project reporting .....	48
Managing changes within the project .....	49
Planned v Actual.....	50
End of stage reviews .....	50
Tolerance .....	51
Using traffic lights to support delivery .....	51
Version control.....	51
Issues log .....	51
☞ Activity 14 Developing a monitoring system.....	52
<b>10 Closedown .....</b>	<b>53</b>
Using a facilitator.....	54
Abandoning and closing the project early.....	55
Communicating project closure .....	55
Post closure actions.....	55
☞ Activity 15 Developing an agenda for a post project review .....	55
Flow chart for each stage of the project management system.....	58
Conclusion .....	59
<b>Feedback: So, how did we do?.....</b>	<b>60</b>

# 1 Introduction

The story behind this e-book started in 1997. Project Agency had at that point been running a variety of project management training events. We started to develop a highly targeted and practical workbook which we used on training events. Over the next few years we developed the content of our main project management course and the associated workbook.

We have received a number of requests for a book which will take people through the project management course without actually attending. Others wanted it even though they had attended. Well, here it is!

This book contains some tried and tested and straightforward advice. It will take you through a project management process which is a cut down version of PRINCE2 (see [www.ogc.gov.uk/prince2](http://www.ogc.gov.uk/prince2)), more practical and certainly shorter, which will support you in delivering on-time and to budget, or click [here](#) for PRINCE2 run by Project Agency

This book contains:

- examples of elements of a project, e.g. a completed risk register
- activities that will help you deliver your own project helping you move your project forward while developing your knowledge and your skills.
- learning zone which is a place for you to reflect on what you have gained while working on the activity. You should record in the Learning Zone what you feel you have gained while working on an activity. Once identified, this should support you in future project work

I would like you to identify a project you will soon be working on, or a project you have only just started. Let us call this project "*The Sample Project*". You will use *The Sample Project* throughout this book to develop new skills and build on exiting ones.

I suggest you read the whole book first before tackling any of the activities. That way, you will become familiar with the content as well as layout.

My thanks to Tania my PA who has had the unenviable job of understanding my handwriting and putting the ideas into a shape which we believe will help you. Also to Ronnie Landau and Jeff Davies – the best proof readers around. (I take full responsibility for any errors!)

I hope you find this e-book really useful in delivering future projects. Do go to [www.projectagency.com](http://www.projectagency.com) to find out about the services provided by Project Agency.

A final point - please remember this e-book is copyrighted to Ron Rosenhead and Project Agency. Please do not copy any of this book. You are however free to copy the blank templates.

Best wishes and happy projecting!

*Ron Rosenhead*

Ron Rosenhead, Director, Project Agency  
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## 2 How this book works

In each section you will find:

- details of that particular topic – relevant information
- material which you can use during a project e.g. risk logs, critical path analysis
- activities based on our case study, and activities for you to use on your own project
- Learning Zone – an opportunity for you to identify what you have learned carrying out an activity. This will be individual to you. You should put in the space provided in  **Learning Zone** the specific lessons you have gained. At the end of the book, we ask you to collate all of the learning points

Finally, I wish you well in initiating, defining, planning, monitoring and closing your project – all successfully!

## 3 Setting the scene

So, you have a project and you think you want to apply the Project Agency Project Management System (PMS) to it. **WARNING!** This system cannot cover every aspect of project management within your own organisation. You will need to think which elements really do apply to your project. A good example is a small project which has to be delivered in a 4-week period. Yes, you will need to go through the project management process described, but you will not need to go through the system in the same depth as say a key strategic project lasting 14 months with high costs.

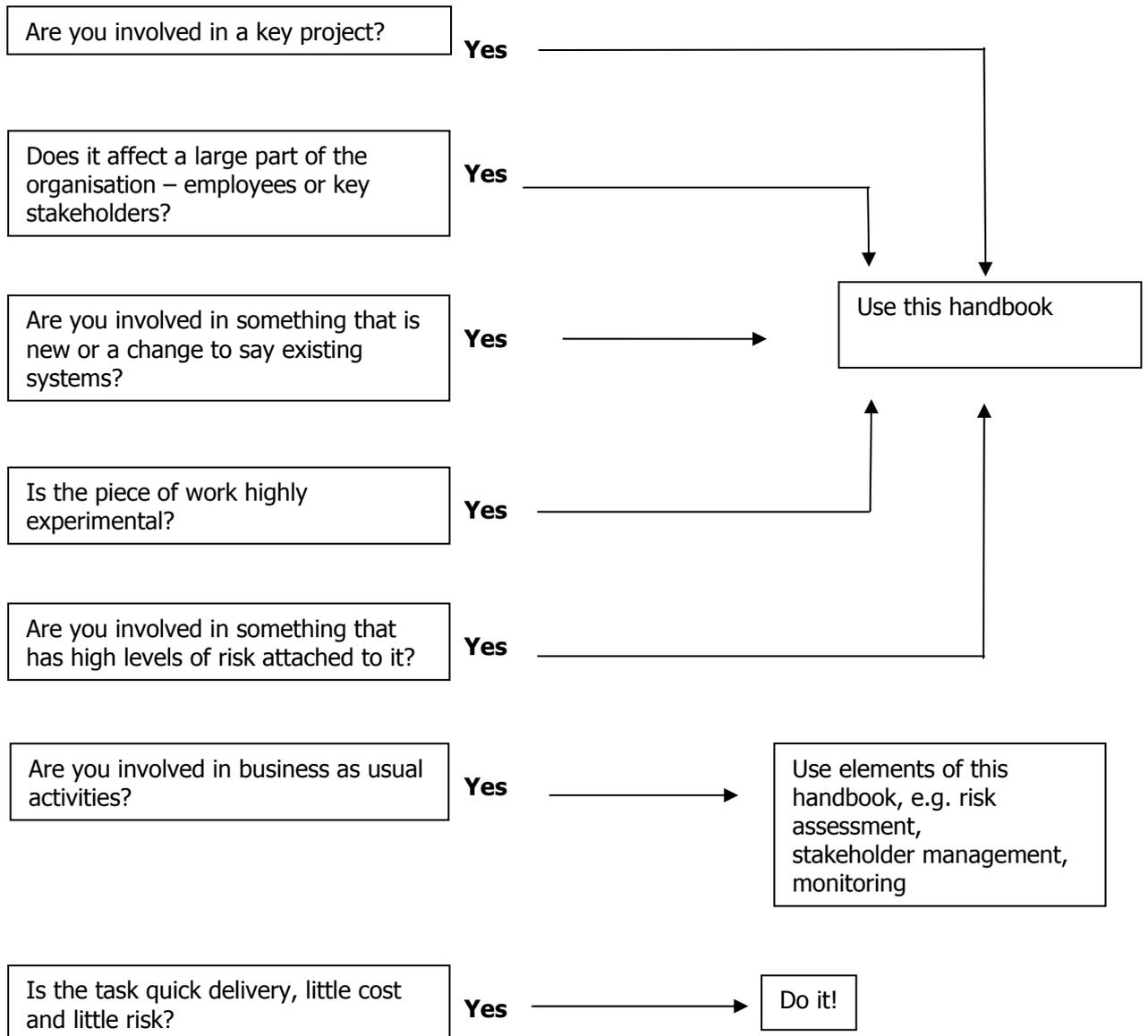
Many of the tools included in this system can be used in every day situations that you may not normally define as a project, For example:

- having clear and agreed objectives
- agreeing roles
- identifying and managing risks/issues
- estimating time/cost
- identifying and managing stakeholders
- monitoring

The above tools are part of the PMS and you will need to use them in some way to support delivery of your project. But when do you use the project management system? The diagram on the next page should help

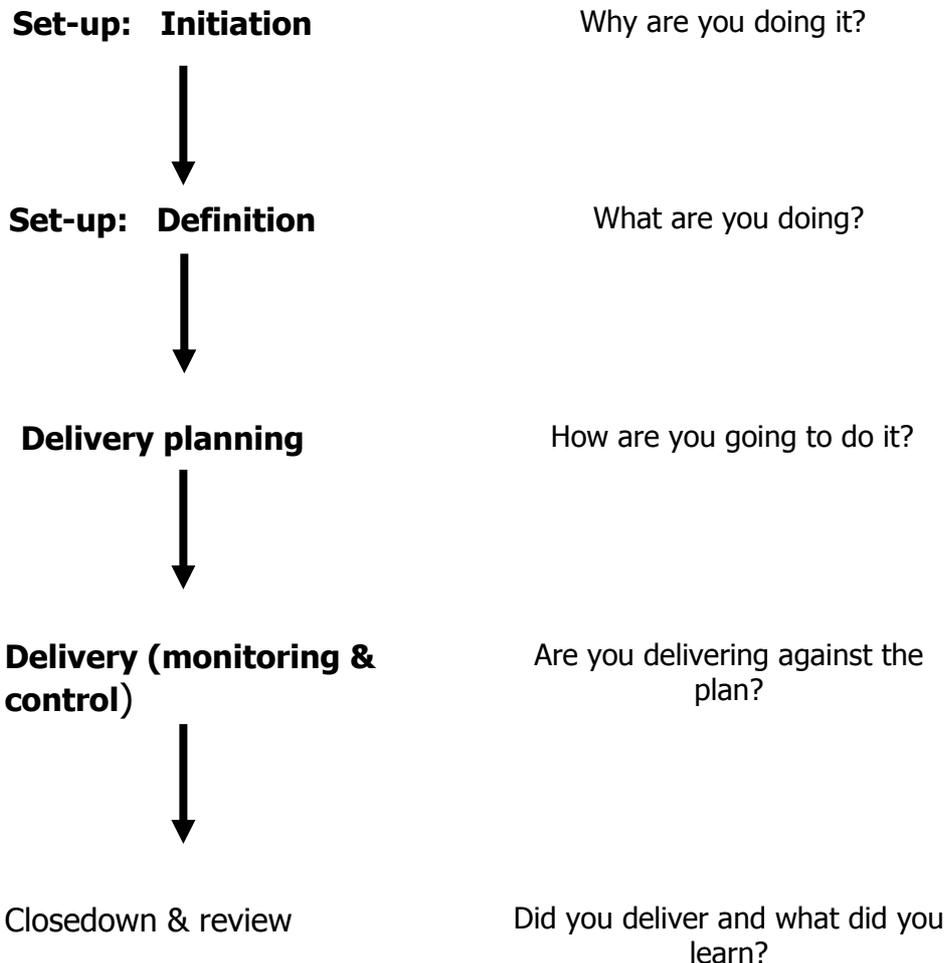
To purchase this book go to [www.deliverthatproject.com/main.html](http://www.deliverthatproject.com/main.html)

## 4 When do you use the project management system



## 5 The Five Stages

Project Agency Project Management System (PMS) has five stages to it.

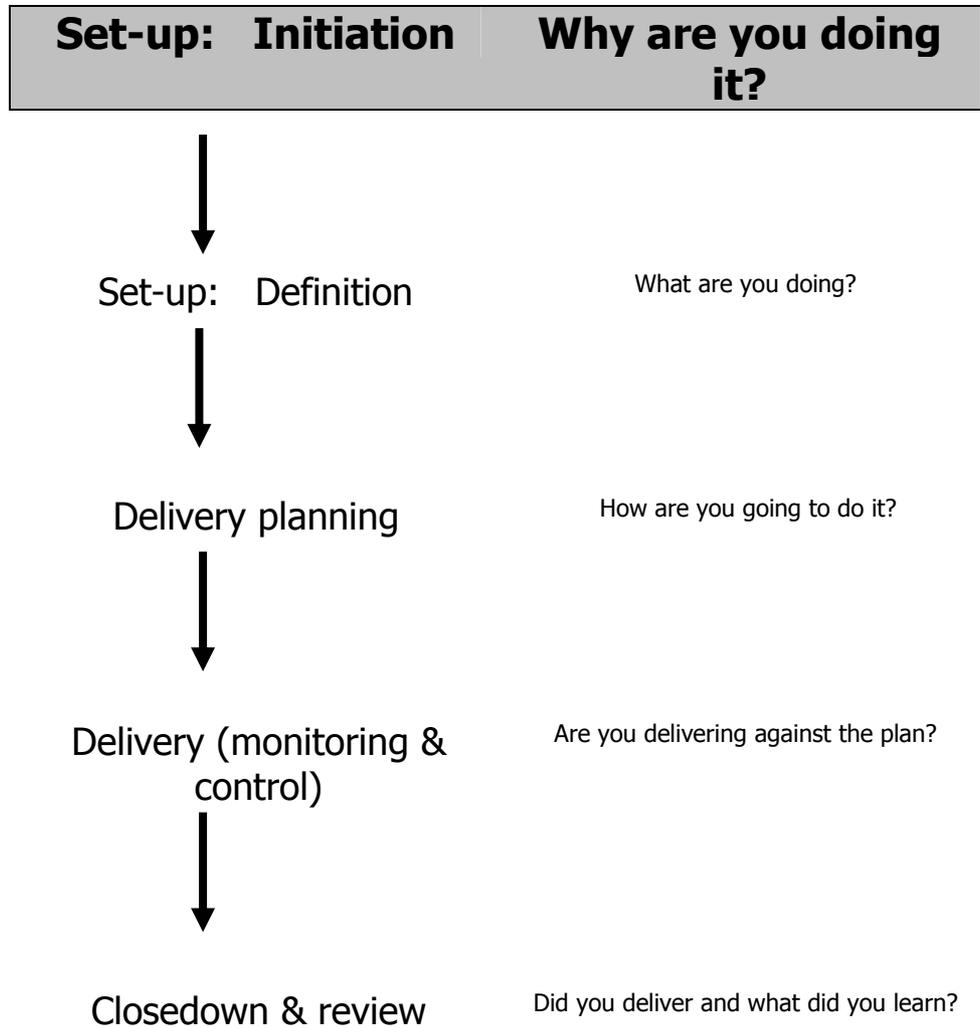


The chart portrays a somewhat idealistic view. In reality the boundaries between the stages are very blurred. So rather than a neat progression from one distinct stage to the next we discover that project management is a process that repeats itself – i.e. you go through the above diagram several times. However it is still worthwhile to hold this ideal model in your head as it indicates what stage you are at and therefore encourages you to undertake the appropriate processes before moving on.

A project sometimes “emerges” from other routine activities rather than being formally initiated. In cases like this a lot of the early and very important processes will have been omitted. So it is important to go back and acknowledge that a more rigorous approach is required. You may well “inherit” a project from other people who may not have done the initial appropriate activities, or may not have done them to your required standard. Thus, please keep this model in mind.

We will now start our journey through the PMS starting with Set-Up – Initiation.

## 6 Set-up: Initiation



This section includes:

- turning the initial idea into a Business Case
- identifying clear project benefits
- ensuring there is a link with the overall corporate plan
- identifying initial risks and stakeholders
- obtaining (or not) formal sign off to invest time and money to carry on with the project

## **Why are you doing this project?**

This is the 1<sup>st</sup> stage in the project management system. It helps clarify WHY you are attempting to deliver the project. This stage starts with the development of a Business Case for your project. The process may be very straightforward or very complex. At a minimum, your Business Case should identify:

- how it fits with overall objective of the organisation or department
- the benefits of the project to the organisation, customers, staff, etc.
- initial estimate of costs
- outline objectives
- initial risk assessment

You will need the support of your project sponsor (senior manager) and maybe others to develop the Business Case. e.g. those in the finance department.

The amount of detail required within the Business Case should reflect the size and complexity of the project. The Business Case contains the best information at that stage – inevitably, there will be some unknowns.

The Business Case sets the context for your project. It will allow you and senior managers to identify whether there are real business benefits behind delivering the project. Research has shown that many organisations are engaged in projects which do not or will not contribute to the bottom line. Obtaining a formal sign-off of your initial Business Case documents will ensure that you are not wasting time on a project that is of no benefit to the organisation.

How do you develop a Business Case? Project Agency has developed a simple template to use on projects. Use it as a building block for your project and you can add any extra details you may want.

A form is shown on the next page.

## Business Case form

Complete the form below and submit it to your senior manager or sponsor for approval

\*

Background to the project [PLEASE KEEP BRIEF]
General aims[s]
Initial risks
Expected outcomes
Benefits of implementing project
Initial estimates of cost and time  £:  Time:
Outcome of the Business Case
Decision from [x x]
Date

You can add other elements according to the needs of your Business Case.

## **Consider the following project brief**

The company has undergone radical change over the last 9 months. Staff numbers have increased by 85 and will grow over the next year – another 100 staff are predicted. A key issue is ensuring all staff are aware of the company values and strategic direction. In addition, senior managers are aware of how unsettling all of the changes have been to our existing staff. These include:

- a new computer system which impacts everyone
- the development of XTL – a new product which has revolutionised our sales activity
- relocation to a new offices which requires a little updating. However, it will allow the company to be in one building. There are additional buildings which we can expand into if needed.
- the new strategic alliance with a European Company – Theo. The planning for this is in the early stages and will impact all staff over the next 3 months

The Board has decided, in agreement with Director of HR, to hold a series of courses. The exact objectives have been agreed and include:

- helping to develop a strong culture within the company
- working as one company
- meeting customer needs as a key priority
- explaining future strategy and the impact on all of above and the role staff have in making it happen

Senior managers will take part and run some of the sessions.

You have been asked to develop a Business Case for this project (called The Strategic Training Initiative –STINT).

On the next page you will find a completed Business Case for this fictitious project.

## Business Case for STINT

<p><b>Background to the project (PLEASE KEEP BRIEF)</b>  <i>There have been enormous changes within the company over the last 9 months. Future expansion plans mean that staff need to see the wider picture of where the company is going - the full strategy. The Board want a series of courses to create a stronger culture and values.</i></p>
<p><b>The link with the strategic plan. Write here the part of the plan it fits into.</b>  <i>Creating a stronger internal company image (Section 23.6), Meeting customer needs (Section 29.4)</i></p>
<p><b>General aims(s)</b>  <i>To organise a series of workshops for all staff to attend focusing on a stronger internal image and building a clear vision for staff</i></p>
<p><b>Initial risks</b></p> <ul style="list-style-type: none"> <li>• <i>senior managers (directors) do not participate in the programmes</i></li> <li>• <i>middle managers block attendance</i></li> <li>• <i>accommodation for training scarce - soon to rewire new training centre</i></li> </ul>
<p><b>Expected outcomes</b></p> <ul style="list-style-type: none"> <li>• <i>a training course focussing on new values will have been developed</i></li> <li>• <i>all staff to attend the sessions</i></li> <li>• <i>staff to have a clearer vision where company is going</i></li> <li>• <i>staff are clear about need for a high level of customer satisfaction</i></li> <li>• <i>contribute to working as one company</i></li> </ul>
<p><b>Benefits of implementing this project</b></p> <ol style="list-style-type: none"> <li>1. <i>staff turnover reduced from 18% to 10% in 12 months. 5% in 24 months</i></li> <li>2. <i>a clearer vision for the future for all staff leading to staff focusing on key business issues</i></li> <li>3. <i>it provides a focal point for staff to raise issues and suggestions</i></li> <li>4. <i>improve customer retention - from current 54% to 75% in 12 months and 90% in 24 months</i></li> </ol>
<p><b>What other options have you considered? Please list ALL the options considered and why you have chosen the one option.</b></p> <ol style="list-style-type: none"> <li>1. <i>Run workshops for all staff</i></li> <li>2. <i>developing a CD for staff to take home with them</i></li> <li>3. <i>briefings by line managers</i></li> </ol> <p><i>Option 1 chosen as it involves Directors in its delivery team to be big hitting and will get real results</i></p>
<p><b>Initial estimates of cost and time – this should include an INITIAL ESTIMATE of the people needed to deliver the project (“the project team” )</b>  <i>Estimated at £100,000 - full analysis needed before agreeing to budget. Expect delivery to be in approximately 5 months.</i></p>
<p><b>Decision from:</b> J Andrews: <i>Business Case approved</i>  <b>Date:</b> <i>April 18</i></p>

## Activity 1 Writing your own Business Case

You have seen the example in this book of how to write a Business Case. Now it's your turn to write one.

Use The Sample Project and have a go at developing a Business Case for it. Once completed, let someone more senior have a look at it and make some comments. Obtain formal agreement (sign off) before progressing.

### Business Case form

Background to the project [PLEASE KEEP BRIEF]
General aims[s]
Initial Risks
Expected Outcomes
Benefits of running with this project
Initial estimates of cost and time £: Time:
Outcome of the Business Case
Decision from [x x]
Date

Add any elements you may need in order to complete this form.

Project Agency has had many comments on training events suggesting that there are too many projects. However, if you go through this stage effectively, it should identify whether the project is part of the overall strategy. If it is not, you are wasting the opportunity of working on a key priority.

Research by the Abbey Group suggested:

- The key is to do the **RIGHT PROJECTS**
- Do these projects **RIGHT**
- **DELIVER** these projects
- Deliver project **BENEFITS**

Once you have completed the **Set-up: Initiation** stage and had the Business Case signed off you need to move into the next stage; **Set-up: Definition**

Your Business Case should be a focal point of the project. It should be used throughout the life of the project – helping you review whether you are still on track to deliver the benefits.

Please note you will need to monitor and control your project once Set-Up: Initiation starts. I recommend you read Section 10 before you go much further.

For further information on Developing Effective Business Cases – a one day training programme, click [here](#).



## **Learning Zone**

In this section we have looked at:

- turning the “good idea” into a Business Case
- the need for clear project benefits
- ensuring there is a link between the “good idea” and the corporate plan
- the need to identify risks and key stakeholders

**Identify below the key learning points from the above areas. These will be individual points you have gained by reading the content or carrying out an activity. You will be asked to look at all of the learning from the various Zones at the end of the book.**

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## This is a copy of the first chapter of Deliver That Project.

I hope that you feel it is a book you can usefully use to help you deliver YOUR projects. I am more than happy to field any issues you may have – email me [ron@projectagency.com](mailto:ron@projectagency.com)

The e-book comes with a range of bonus items go to [www.deliverthatproject.com/main.html](http://www.deliverthatproject.com/main.html) to find out more.

This e-book will:

- ☞ **save you TIME:** you will deliver on time using this great project management system complete with examples and templates
  
- ☞ **save you MONEY:** know matter where you are in the world, you will be under pressure to deliver to a specific budget – if you have a budget. This model will ensure you hit the budget time after time after time
  
- ☞ **save STRESS:** many people we work with say that they need a process, a framework for their projects. Without it they are in the words of one person who came on a course – “in the wilderness stressed with know where to go”. This book provides you with the mechanisms to get out of the wilderness.

It is tried and tested and practical – and you know what, it works!!

Best wishes and one last time here is the link to purchase this book:

<http://deliverthatproject.com/main.html>

**See next page for comments from people who have purchased this e-book.**

## **Look what people have said about this book!**

"Helped me enormously. A great resource, thanks" - **Lawrence, Dewsbury W. Yorkshire**

Ron, thanks, thanks, thanks....this book helped me so much! I faced a really tough deadline with no idea how to reach it. Came across your stuff, the free course and the book and bought it. This book is worth a ton of money. Keep up the great work. **Mike Stephens, New York**

"I needed something and this book really did the trick. I delivered on time for the first time! **Rob Weiner, London**

"I liked the style. It's almost as if someone is speaking at you helping you along the way. I delivered my project and could not have done without this book" **Denise Williams Manchester**

"I wished I had had this e-book years ago. It is a great tool, I learnt a huge amount and what's more it helped me win new business. **Trevor Sadowski, Essex**

When I bought this book I sat up all evening and read it. I then started to work my way through my own project and in one evening moved further forward than I had in the last 3 months. It cleared the fog and I felt so much better. **Pam Ponzens Australia**

Thanks for the e-book. Yes, I paid for it and I am glad I did. But, Ron why are you selling this book so cheaply? I saved many many thousands of \$ on my project thanks to you and your e-book. **Sandi Ray, Chicago**