

# PROJECTS

## Getting Started

*A paper by Victor S lent, Principal Consultant, Pathfinder Projects*



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## WHAT IS A PROJECT?

Projects are about change. What 'was' - changes in some way. A new service is launched, a new building is finished or a new road is opened etc. Projects are as old as man's first building. Some of the greatest 'projects' in history can still be seen today, - the Pyramids, the Great Wall of China, Stonehenge. The difference today is that three factors usually have to be planned 'up-front', - resources, cost & time-scale.

Today, it is recognised that projects can be related to 'soft' as well as 'hard' products. For instance, the recruitment and formation of a new call centre team of people is a project, in the same way as is the physical part of the call centre telecoms and IT systems.

Each project will have a unique set of deliverables - the end 'product' or 'products'. The project may be simple or complex; it may have a timescale of weeks or years.

Today, projects are measured in terms of cost, time, and quality. For 'quality' read the 'finished product'. At the end we ask, does it do what we wanted it to do when we set out? e.g. does the new tent keep out the rain? Is it quickly and easily erected? In these modern times, project management has come into its own - to manage the 3 pillars of projects - time, cost & quality.

Finally we can define projects as having a beginning, middle & end. They have to be started, built, finished

and handed over to those who will use them. This makes them different from day to day operations such as travelling to work, serving in a café or managing a business. Fundamentally these create no change - they keep things going, day to day - essential, but they are not projects!

To summarise,

When the requirements for change have been assessed, the business forms a project, the project organisation executes the necessary work and once the new system or organisation has been established the operational arm of the business assumes responsibility. The project is then disbanded and it is not until another major change is required that a new project would be formed.

Simple isn't it? Well yes - but many projects aren't successful, costs overrun, deadlines get missed - they do not meet their objectives. So the trick is to have Successful Projects. Getting the foundations right is a key step in making it possible for a project to be successful. This paper offers some ideas on this subject.

## What makes Successful Projects?

Success is in the hands of the people involved in the project - the 'doers' (those actually building the product), the 'users' (who will use the new product), the stakeholders (the people funding the project & those affected

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by it) and the people managing the project (the manager, the sponsor, the evaluators and specifiers). The main group involved in the project are usually known as the project team. Successful teams are a subject all of their own and a topic for another discussion paper as is the detail of the tools which they use (methodologies, practices & procedures) . It is acknowledged that, in the UK, many organisations will use mainly PRINCE2<sup>1</sup> – certainly in the public sector. This is understandable since its sponsor is the Office of Government Commerce (OGC). There are other methodologies, but for the purpose of this paper we will concentrate on getting the project started successfully. A good methodology will help but a great set of tools isn't much good unless we know how to use them, why we use them and in what order to use them. In other words knowing where we are in the wider scheme of things. This paper considers what is important at the beginning of a project - before we start using the tools. So, let's start at the beginning.

The project is like setting out on an 'expedition' – if you don't prepare properly there is a danger you will lose your way or not even get to your goal. The 'goal' of a project is to complete the project and deliver the deliverables – on time, within budget and to the agreed specification – “all

cylinders firing” as it were - to the agreed level of quality. At the beginning we need to have a good understanding of how we are going to navigate our way to the 'goal'.

Making the right decisions at the outset will determine the outcome of your project.

But! - firstly – is there a need for a project?

### **Determining the Need for a Project**

The first job is to determine whether there is the need for a project to begin with. A project may be part of a programme<sup>3</sup> of projects with well defined goals. The need may be obvious, for example the construction of a new motorway or airport requires millions of tasks to be carried out in an organised fashion so that the deliverable comes into service on time and to budget. Those involved in large civil engineering projects, or large scale IT and telecoms projects, are often agreed on the necessity to establish a project to execute the works. However, Sometimes the need for a project is not so obvious and if a business fails to see this need, at the true beginning, the result will likely be confusion, cost overruns, wasted time and money. In such situations one may need to review such things as the organisation's business or technical strategy.

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1 - PRINCE2 in a Controlled Environment - version 2

3 - Programme Management is addressed in another paper.



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Above all you will need to determine what money & resources you need to 'flesh out' the project.

How do we know when a project should be started? Well, - ask yourself this question – are we continuing the day to day operations of the organisation or are we about to do something new? For example are we driving the truck or are we building a new truck; are we processing invoices for payment or are we introducing a new accounting system.

In summary, we can look at all the new things we might want to do..... These new things may well bring about the need for a project.

### Project Aims & Objectives

Once we have determined the need – we need to look at the expected result – the 'end product'. This will help us determine the AIMS & OBJECTIVES of the project.

If the aims & objectives aren't clear then some work needs to be undertaken to clarify them. Before starting the project, this can be achieved through analysis – run a Pre-Study.<sup>2</sup> Write down why you need a project in a draft Project Mandate<sup>3</sup> document what the new 'thing' or 'idea' is. Such a document will, amongst other things, predict the approximate cost, how long it might take and what the desired outcome should be. It will address other things such as what resources will be needed and what the risks are. It will ask – is what we are being asked to do being based on a sound strategy? Above all you will need to determine what money & resources you need to 'flesh out' the project. This aspect of the beginning of the project will have a short time-scale (in relation to the

future project) and have low costs, usually costs which do not need extended discussion before 'go-ahead' is given.

However, at this 'set up' or 'pre-study' stage one must be clear on what the expected RESULT is:

The result can be set down in terms of the AIMS, GOALS & OBJECTIVES.

All of this information must be "SMART":

**Specific** – a statement of what must be achieved – with a single end result for each objective.

**Measurable** – so it is clear as to what degree the result is achieved in order to be successful

**Achievable/Agreed** – providing a clear agreed target or goal

**Realistic** – that it can be done

**Time- Bounded** – when the result is expected

This can then be considered by the project sponsor/s and if approved you will have as it were, the orders for the Ship's captain to prepare for a voyage! But the ship hasn't set sail yet!

Thus, the Pre-Study report gets the 'green light'; work can now start on setting up the project. But... we aren't full committed yet! What you need is more information on costs, time scale and requirements. This detailed information will need to be documented and approved.

2. A Pre-Study – as suggested by the PROPS methodology

3. Project Mandate – as in PRINCE2 – written in the Start Up Stage of the project

Why? – because we now need to start really spending money, committing resources and so on..... This further document may take some time to produce but when it is complete it will, if approved, form the baseline of the project. By now you, the reader, may be saying – come on get on with it!

This further report follows the same lines as the pre-study but it will provide more detailed information and will provide a more detailed budget for the whole project, with some measure of accuracy as to how the costs were arrived at. It should accurately define the first stage costs of the implementation. The 'product' of the project should become very clear during this stage. If this report doesn't achieve this then a further report may have to be produced. It could be a frustrating time for those who want to "get on with it". Such reports can be considered to be a project feasibility study. It may include some organisational, business or technical design information. Once completed one may be ready to write the final version of the Project Mandate and thus launch the project

We have just been talking about what I would like to call, the 'discovery' period - before we start the project proper.

### Discovery Period

In short, there are 3 steps to this process.

1. **Birth** - of the 'Idea' – 'Concept' – 'Business Objective' – New Service or a 'New Product'
2. **Evaluation** – conducting a pre-study/s and feasibility study/s will help clarify the aims & objectives and

that there is real need for a viable project. At this time one will be matching the desired aims & objectives of the project with the overall organisation's aims & objectives. During this period one will be delving deeper into the justification of the project whilst ensuring that the project objectives match the organisation's strategy, taking account of the desired benefits and risks etc.

**3. Project Launch Preparation** – once the preparations have been completed the project can be brought to 'launch' state. This final step in the pre-launch period should be consideration of issues such as – what sort of team do we need to make the project a success, who should manage the project and who should 'govern' the project. If all is prepared we are at the point (If approved) that the first stage of implementation can begin!

### Ready to Launch

So the first stage of the SET UP PERIOD is DISCOVERY. We will have answered these questions (with a reasonable margin of accuracy!).

1. What do we need to accomplish?
2. When do we need to accomplish it by?
3. How much money do we have to spend?

Management should have been asked to 'sign up' to the next stage (the Initiation Stage in Prince 2 terms). They will have agreed to the whole project, subject to the successful completion of the Initiation Stage:

1. Are we agreed on the direction we are going in?

Pre-studies and Feasibility studies will help clarify the aims & objectives & that there is real need for a viable project



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2. Are we agreed on the resources necessary to accomplish our goals?

3. Are we agreed on how much this will cost to accomplish?

During this discovery period we are in a consultation mode – nothing has been ‘hard & fast’ – we have been calling on expertise temporarily from within or outside the organisation.

The next stage is to actually set up the project and get on with building the product or service - starting with the Initiation Stage - and that is a subject for another occasion.

Pathfinder has developed a model for keeping the overall process in view throughout the lifecycle of business projects.

How do we know when a project should be started? Well, - ask yourself this question – are we continuing the day to day operations of the organisation or are we about to do something new?

### CIPP™ - Continuous Improvement in Projects & Programmes: Project Model



#### About the Author

*Vic lent has been involved in managing and delivering professional services for over 20 years mainly in the IT & Telecommunications arena. He has a Masters degree from the University of Sussex in the Management of Technology. He is a member of the British Computer Society and a Chartered IT Professional. His specialism is in programme & solutions management*