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## DEFINING AND ORGANIZING THE PROJECT

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### Establishing the Project Organization

As indicated previously, knowing project objectives and the responsibilities of each team member as well as the role of senior management and relevant stakeholders is essential. This step ensures that basic things such as the identification of the project manager and project team members along with their positions and responsibilities within the project structure. Thus, there are several questions that need be asked when establishing the **team structure**.

- Who is the project manager? What are the project manager's responsibilities and level of decision-making authority?
- Have the project manager's roles, responsibilities, and authority been agreed with management as well as team members and subsequently written down?
- Who is on the team? What are the qualifications / skills of each team member?
- Are all personnel involved in project-related work known?
- What are the member-specific roles, responsibilities, and level of decision-making authority of each team member? Have they been agreed with management and written down?
- Has a team roster been completed?
- Who sponsors the team? To whom does the team report?



Highly motivated, qualified project managers are central to overall project success. As such, the best project managers exhibit a variety of traits, including but not limited to:

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<sup>1</sup> See footnote page 3.

- Positive leader, mentor, coach, and teacher
- Able to maintain a strategic view
- Excellent communication skills
- Effective organizational skills
- Committed to achieving project goals

In addition to these traits, the **project manager** ensures that team members understand their roles and responsibilities as well as implementing sound project management principles. At the same time project managers keep team resources centered on achieving project objectives through planning and implementation, effective tracking and monitoring of project status, maintain (or oversee maintenance of) project records and files, and act to resolve intra-team conflicts as well as conflicts between the team or project and other internal and external actors. Simultaneously, the project manager must communicate the project status to team members and stakeholders while continuously updating an *issues log* detailing what, in line with existing or revised plans, needs to be resolved or addressed to achieve project aims.

**Team members** in turn must take the responsibility of learning and using project management skills to assist in the planning and execution of the project. Commitment and a willingness to perform project tasks are essential, as is team member involvement in providing insights as to project progress and potential risks or issues to be addressed; this enables more efficient tracking and monitoring by the project manager.

One tool to use is the **team roster**, which outlines basic team information, such as the following:

<u>Name &amp; Title</u>	<u>Project Role(s) &amp; Responsibilities</u>	<u>Home Organization/ Department.</u>	<u>Phone &amp; Fax Nos.</u>	<u>E-Mail Address</u>	<u>Office Location</u>	<u>Emergency - After Hours Contact Details</u>

## Defining the Project Parameters

As indicated earlier, it is essential to understand clearly what the projects' various elements, objectives, and outputs are.

The **Project Objective Statement (POS)** details what the project is supposed to achieve; it is the mission. This details what the project aims to achieve, the length of time to achieve project aims, and a statement of what resources will be needed. These three points are known as the project's *scope*, *schedule* and *resources*.

Scope should capture the essence of the project's successful outcome.

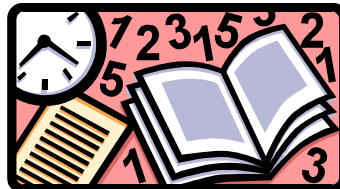
Schedule should capture the desired, or target, completion dates for the project. How long it is going to take you to finish each task.

Resources capture the allocation of human, material, and financial and resources to the project

The POS is short, concise, and visionary. The POS pushes people to focus, thinking about the project's purpose and how they fit into that purpose. Moreover, the POS sets the stage for the development of project strategy and methodology, structure, resource requirements, schedules, and implementation processes.

A good POS exhibits the following characteristics:

- Written in 25 words or less
- Uses plain language
- Cogent and concise
- Visionary and inspiring



Keep it short and to the point; less equals more. The more people read, the more opportunity they have to lose track of what the project aims to accomplish.

A good POS might be, in relation to the American project that placed a man on the moon, as follows:

*The United States will place a man on the moon and return him to earth by the end of 1969 at a cost of USD 20 billion.*

**Statement of Major Deliverables**

This is another technique that further refines the scope stated in the POS. Major deliverables are the major project outcomes or results that are the primary focus of management attention and represent the basis for determining project success.

In a project, you are supposed to provide several **outcomes**. In reference to the placing a man on the moon example, some major deliverables would be:

- Completion of rocket engine testing
- Completion of design, testing, and construction of space communication systems
- Completion of construction of the spacecraft
- Completion of astronaut training
- Completion of construction of the space launch facilities
- Placing a man on the moon
- Safe return of astronaut to earth

**The IS/IS NOT Approach**

As major deliverables are key to the project’s success, it is important to clearly define and comprehend each deliverable. The IS/IS NOT technique, using team brainstorming, provides a quick yet effective picture of what constitutes each project deliverable. The IS column represents those things that are characteristic of the deliverable while those in the IS NOT column represent what is not included in the deliverable. This helps define what each deliverable is, avoiding the so-called “mission creep” wherein additional traits or associated outcomes are assigned to each deliverable, a phenomenon allowed by ambiguous, ill-defined deliverable descriptions. When presented to senior management, it also allows them to quickly assess whether each deliverable defined by the team is in line with management and organizational vision.

IS	IS NOT
Services Enhancement	A strategic plan
Patient Satisfaction	An employee performance review
Increased Public Information	
Job satisfaction	

## Planning the Project Framework

Having a properly defined and comprehensive approach to how the project will be carried out is essential to minimizing time and resource wastage. At the same time, a smooth running “well oiled” project builds morale, decreases stress, and increases team cohesion.

Although technology allows for a certain decentralization of communication, meetings are still the primary means of communication and project work; unfortunately, they can also become a major source of frustration and wasted time.

Everyone has been present at a meeting they either had no need to attend or that was mismanaged. Given these negative meeting experiences, a more proactive approach to managing meetings is required.

Key points to remember when **organizing meetings** are:

- Establish a regular meeting time and duration
- Establish attendance guidelines to ensure only those personnel needed are present
- Set a focused agenda for every meeting and disseminate it prior to the meeting
- Aggressively manage issues during the meeting to keep focus
- Log and identify problems, but do not try to solve them in the meeting – solve them directly with those personnel relevant to the problem afterwards
- Establish decision-making procedures (decisions by consensus, by majority vote, by project manager alone, by senior management, etc.) and who is going to be making decisions at that level



Project management is based on continuous management of project-related issues. A methodological approach to recording or logging all relevant issues is a mechanism by which the project manager remains in control of the project's progress. Thus an issues log is created wherein issues are listed with a person being identified to handle or address each issue. Also, an escalation path detailing what steps are

to be taken for solving unresolved issues is useful in making it clear who or what is required at successive levels to overcome problems and push the project forward.

### ***The Kick-Off Meeting***

The kick-off meeting is the first meeting of the project manager and the project team; senior managers or other stakeholders may also be present. The kick-off meeting is important as it sets the project's tone. It also offers an opportunity for initial brainstorming as to project team structure, plans, potential problems and risks.

#### **Sample Agenda for kick -off meeting :**

- Introductions
- Vision
- Scope and Objectives
- Risks, Challenges and Constraints
- Project Approach
- Team Members and Project Organization Chart
- Roles and Responsibilities
- Timeline
- Major Milestones
- Process, Standards, Methods
- Quality Plan
- Project Management and Schedule Planning Guidelines
- Centralized Document Storage Location
- Project Collect Status Requirements
- Training Schedule
- Lessons Learned from Previous Projects and Key Success Factors
- Project Expectations and Next Steps
- Unresolved Issues, Assignments, and Target Dates Adjournment

Systematic logging of all issues in an issues log makes decision-making about the issues easier since the process of logging itself focuses the issue. The issues log is usually maintained by the project manager and used to identify problems that cannot be immediately resolved. He is the coordinator, he is not doing all the work himself, he needs to know what is going on within his team, within the project.

**Sample Issues Tracking Form**

<u>Issue #</u>	<u>Date</u>	<u>Originator of Issue</u>	<u>Description &amp; Potential Impact</u>	<u>Action Person (Task Owner)</u>	<u>Action by Date</u>	<u>Status or Resolution</u>
24	Dec.2, 2000	Ahmed Munir	Faster than expected decrease in budget, could result in cost over-run	Project Manager	Dec. 5, 2000	Open, will discuss with financial officer
25	Feb. 6, 2001	Jennifer Sarah	Field personnel at site X were injured in accident, new personnel needed	Jennifer Sarah	Feb. 10, 2001	Resolved; new personnel sent to site

A project file should be maintained by a team member to serve as the central repository of all project documents. It is necessary to keep all documents in one central location. People may keep photocopies of certain different pieces that are on use. That is fine, but all the project information should be kept in one room. Even if the project is several parts, you have to keep them all together. People cannot come and borrow for a couple of days. One has to sign it out, or read it in the office. Sometimes it can be kept in the directory, which is shared where somebody can read it, but cannot edit it.

Having a communication plan that details how the project team will conduct internal and external communications is necessary to save time lost over inefficient or missed communication.

**Assembling the Project Definition Document**

Once the project is organized and the project framework established, the information from these steps is assembled into what is known as the **Project Definition Document (PDD)**. The PDD is going to be the core document that you are going to have in your files, or in your central location, and will remain the primary reference point detailing project organization and framework throughout the life of the project.<sup>2</sup>

Key issues or questions when preparing the PDD are:

- Is the issues log being regularly *updated and reviewed*? It is not good just to log, you have to do something about it. If you bring out an issue or a problem, and it is finished and corrected, you don't have to deal with it anymore. But if it has not been corrected, it actually has to be sorted out.

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<sup>2</sup> A sample PDD is attached as Appendix 1.

- How will the team *resolve disagreements and conflicts*? Is it by consensus? Or depending on the issues where the project manager is going to take the decision. Everybody has to agree on how this is going to happen, so you try to minimize the amount of fighting, conflict or personal clashes that can occur.
- Is there an escalation path for *unresolved issues*?
- How will the team *communicate* (e-mail, memoranda, telephone, etc.) Don't rely on verbal communication. Verbal communication is always a central medium, but it is important to write down the essence of verbal communication – then check what is written with the person or people with which verbal communication occurred – to ensure that what was heard was what was meant. Moreover, writing down verbal communication will mitigate the risk of misunderstanding when sharing that communication – be it from management, between team members, or from stakeholders – with others.



Key questions:

- Has senior management *authorized* and agreed to the PDD in *writing*?
- Have these agreements been written down & *stored* in the project file?

A key point to remember is that, although the project manager will have non-management tasks to accomplish particularly if it is a small team, the major role of the project manager is to coordinate team activities. Project managers should not be involved so much in doing the tasks as ensuring they are carried out effectively, in accordance with accepted work procedures and plans, and on time. The team is supposed to do the tasks. There is not enough time to both coordinate and do all of the work required by the project.