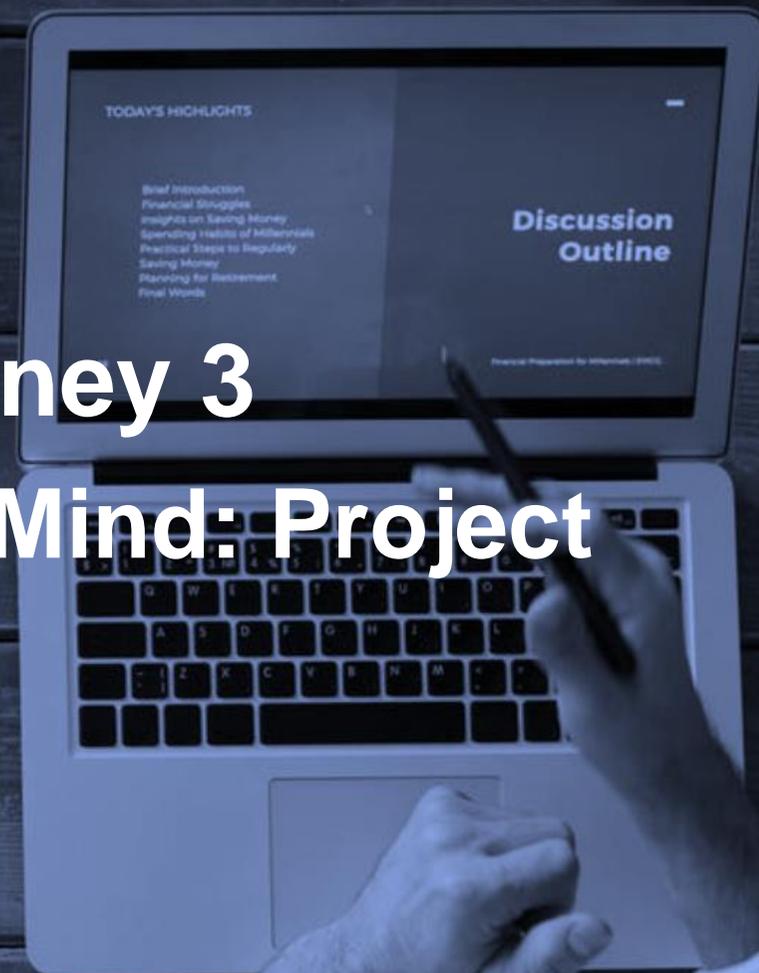




PRONTO  
Right First Time

# Learning Journey 3

## Begin with the End in Mind: Project Planning



# Foreword

Enterprises, whether large or small, need to constantly review and improve the quality of their products and services and to find new ways of responding to new challenges and opportunities to remain competitive. Organisations need to constantly innovate and improve their processes, productivity and performance or risk being left behind by competitors offering better, cheaper, faster service and products. Business improvement projects can play an important role in helping business owners and managers to drive change and improvements.

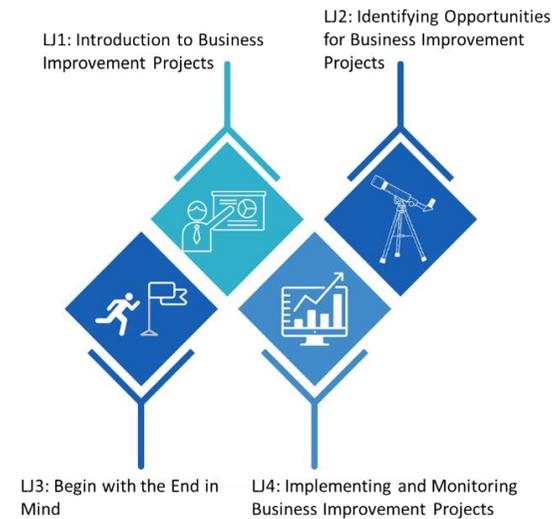
**Learning Journey 3: Begin with the End in Mind – Project Planning** has been developed as part of the Erasmus+ project called Projects On Time and On Budget (PRONTO) and is one of a set of four modules. This module defines the purpose and structure of a Project, identifies the project success factors and characteristics, defines the features of projects, Project roles and responsibilities. It helps to understand the stakeholder needs through the definitions of stakeholder management methods. Control cycle cycles, Project meetings, cost allocations and budgets are also the topics that are covered by this module.

<https://pronto-project.eu>



# Learning Journeys

This Learning Journey is called **Begin with the End in Mind: Project Planning**. It is part of a set of four Learning Journeys exploring the use of business improvement projects.



Each Learning Journey comprises an explanation of key terms, tools, and methodologies. In some Learning Journeys, there are:

- Practical 'how to checklists'
- How to guides and
- Examples of digital tools

On completion of the four Learning Journeys, you will be able to plan, implement and evaluate the impact of business improvement projects within your own enterprise.

# Introduction

## Aim

This Learning Journey is about the nature and context of projects, individual roles and responsibilities within projects, and a project management process.

## Learning Outcomes

- Understand the nature and context of projects
- Understand the management of stakeholders including the project team roles and responsibilities
- Understand the planning and control of projects

Learning Journey 3

## Begin with the End in Mind: Project Planning

- **Introduction**
- What is a Project and things to do when starting a project
- Project Success factors and Characteristics
- Project Life Cycle
- Roles in Projects
- Project Management Model
- Project Organisation and Stakeholders
- How to prepare a Gantt Chart?
- Project meetings and review meetings
- Cost and resource control and allocation
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# What is a project?

A project is a unique, transient endeavour, undertaken to achieve planned objectives, which could be defined in terms of outputs, outcomes, or benefits. A project is usually deemed to be a success if it achieves the objectives according to their acceptance criteria, within an agreed timescale and budget. Time, cost, and quality are the building blocks of every project.

A business process is a set of activities performed by one or more people with the aim of achieving business goals. For a company to be productive and profitable, its processes must be effective. An effective process is a process that produces the right results consistently.

## Things to do when starting a project

We need to be thoughtful of how we define and organize it, before we even start any aspect of the planning. Several questions to be answered:

- What is the goal? The goal will be a high-level goal.
- What are the three objectives:
  - Scope: Over what kind of time frame are we talking about executing our project? By when does it have to be finished?
  - Time: The scope is usually a description of requirements, qualities, specifications of a product that we are going to eventually deliver.
  - Budget: the budget has everything to do with cost and resources that we have available to us for the purposes of this project.
- What is the organization that we need to establish to get things going?

Learning Journey 3

## Begin with the End in Mind: Project Planning

- Introduction
- **What is a Project and things to do when starting a project**
- Project Success factors and Characteristics
- Project Life Cycle
- Roles in Projects
- Project Management Model
- Project Organisation and Stakeholders
- How to prepare a Gantt Chart?
- Project meetings and review meetings
- Cost and resource control and allocation
- Budget and monitoring processes

# Begin with the End in Mind: Project Planning

## Project Success factors and Characteristics

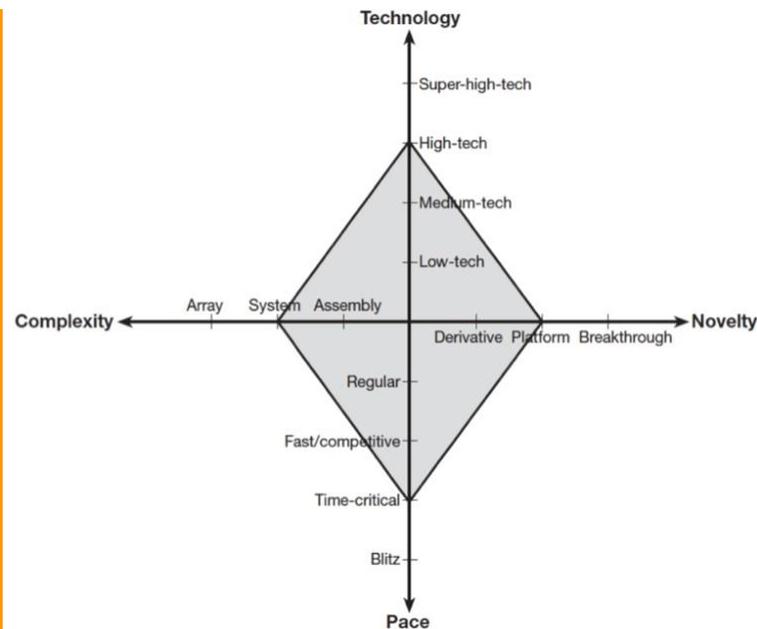
How can we be successful with our projects? And what dimensions effect or might lead to successful projects?

Four dimensions introduced by Aaron Shenhar and Dov Dvir.

Shenhar and Dvir talk about four aspects or four axis that we might want to consider and map our project onto, technology, novelty, pace, and complexity.

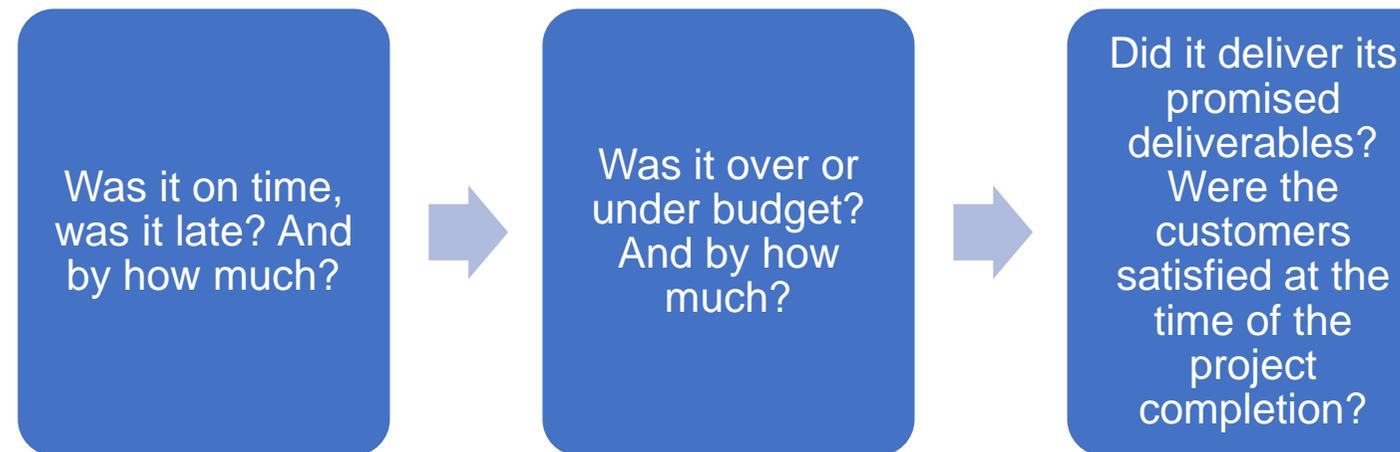
They present a new model for planning and managing projects, and explain how to use the "diamond system" to understand the nature of each project and diagnose whether the company's current resources are sufficient to bring the project to fruition.

With the diamond model determined, you can select the most suitable project manager, assign the work team and identify how much management attention is necessary. The model is used during start-up, to allocate resources, and as a tool for potential risks and benefits of each project.



- Introduction
- What is a Project and things to do when starting a project
- **Project Success factors and Characteristics**
- Project Life Cycle
- Roles in Projects
- Project Management Model
- Project Organisation and Stakeholders
- How to prepare a Gantt Chart?
- Project meetings and review meetings
- Cost and resource control and allocation
- Budget and monitoring processes

When we talk about a success of a project, we define it with respect to its objectives. Therefore, we need to go back and revisit our project objectives. And so, a successful project will be a project that is on time, on budget, and delivers the scope.



Answering these questions will help us determine whether our projects are successful or not.

Learning Journey 3

## Begin with the End in Mind: Project Planning

- Introduction
- What is a Project and things to do when starting a project
- **Project Success factors and Characteristics**
- Project Life Cycle
- Roles in Projects
- Project Management Model
- Project Organisation and Stakeholders
- How to prepare a Gantt Chart?
- Project meetings and review meetings
- Cost and resource control and allocation
- Budget and monitoring processes

# Project Life Cycle

The project management life cycle is usually broken down into four phases: initiation, planning, execution, and closure. These phases make up the path that takes your project from the beginning to the end.

INITIATE	PLAN	EXECUTE	CLOSE
<ul style="list-style-type: none"><li>• Undertaking a feasibility study</li><li>• Identifying scope</li><li>• Identifying deliverables</li><li>• Identifying project stakeholders</li><li>• Developing a statement of work</li></ul>	<ul style="list-style-type: none"><li>• Creating a project plan</li><li>• Creating workflow diagrams</li><li>• Estimating budget and creating a financial plan</li><li>• Anticipating risks and potential quality roadblocks</li><li>• Holding a project kickoff meeting</li></ul>	<ul style="list-style-type: none"><li>• Creating tasks and organizing workflows</li><li>• Briefing team members on tasks</li><li>• Communicating with team members, clients, and uppr management</li><li>• Monitoring quality of work</li><li>• Managing budget</li></ul>	<ul style="list-style-type: none"><li>• Analyzing project performance</li><li>• Analyzing team performance</li><li>• Documenting project closure</li><li>• Conducting post-implementation reviews</li><li>• Accounting for used and unused budget</li></ul>

*“At its most fundamental, project management is about people getting things done.”*

Dr Martin Barnes, APM Former President

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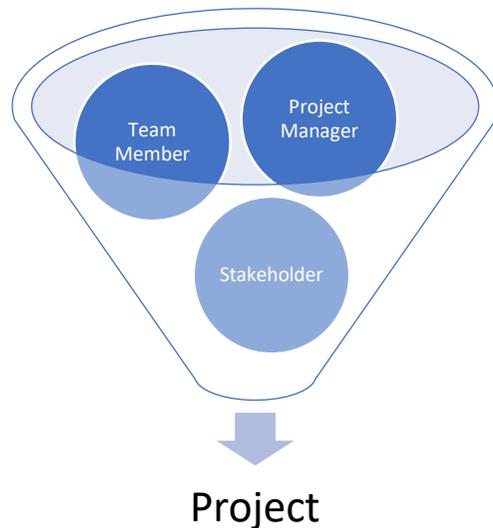
## Begin with the End in Mind: Project Planning

- Introduction
- What is a Project and things to do when starting a project
- Project Success factors and Characteristics
- **Project Life Cycle**
- Roles in Projects
- Project Management Model
- Project Organisation and Stakeholders
- How to prepare a Gantt Chart?
- Project meetings and review meetings
- Cost and resource control and allocation
- Budget and monitoring processes

# Begin with the End in Mind: Project Planning

- Introduction
- What is a Project and things to do when starting a project
- Project Success factors and Characteristics
- Project Life Cycle
- **Roles in Projects**
- Project Management Model
- Project Organisation and Stakeholders
- How to prepare a Gantt Chart?
- Project meetings and review meetings
- Cost and resource control and allocation
- Budget and monitoring processes

# Roles in Projects



## Project manager

The project manager identifies the central problem to solve and determines, with input from the sponsor and stakeholders, how to tackle it: what the project's objectives and scope will be and which activities will deliver the desired results.

She/he then plans and schedules tasks, oversees day-to-day execution, and monitors progress until he evaluates performance, brings the project to a close, and captures the lessons learned

## Team member

The project team members have skills relevant to the project and can work with varying degrees of autonomy depending on the methodology used in managing the project. They are responsible for executing their tasks and for updating their statuses to the project manager in order to track the overall progress of the project.

## Stakeholder

Any individual whose interests may be affected as a result of project execution or project completion. Normally, stakeholder groups have a representative to champion their needs on a project team. Tasks:

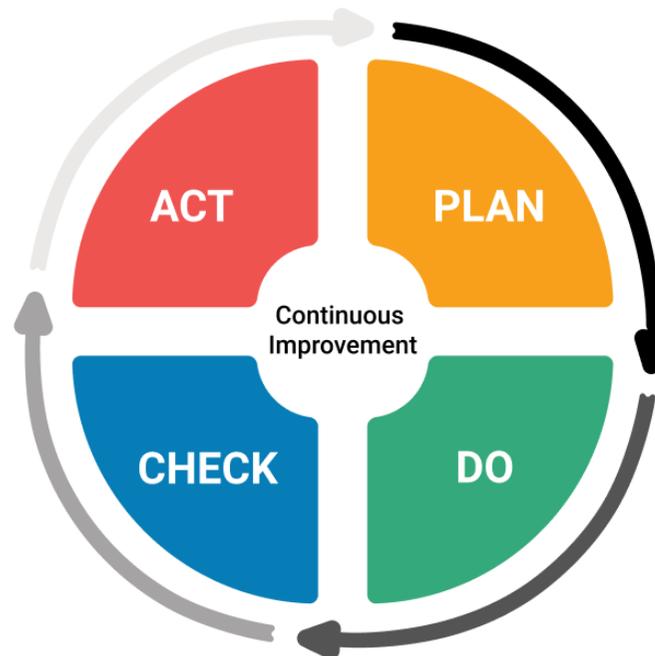
- Has vested interest in the completion of the project and how the project will impact their specific area.
- Provides information, as needed, to insure that the project stays on track and meets the intended goals and deliverables.

# Project Management Model

A project management methodology is a set of principles, tools and techniques that are used to plan, execute and manage projects.

## Deming Cycle (PDCA)

The PDCA provides a methodology for implementing continuous improvement – it is also often known as the ‘Deming Wheel’ after Dr William Deming who pioneered the model. With the PDCA cycle you can solve problems and implement solutions in a rigorous, methodical way.



Learning Journey 3

## Begin with the End in Mind: Project Planning

- Introduction
- What is a Project and things to do when starting a project
- Project Success factors and Characteristics
- Project Life Cycle
- Roles in Projects
- **Project Management Model**
- Project Organisation and Stakeholders
- How to prepare a Gantt Chart?
- Project meetings and review meetings
- Cost and resource control and allocation
- Budget and monitoring processes

# Plan

- First, identify and understand your problem or opportunity.
- Explore the information available in full. Generate and screen ideas, and develop a robust implementation plan.
- Be sure to state your success criteria and make them as measurable as possible. You'll return to them later in the Check stage.

# Do

- Once you've identified a potential solution, test it safely with a small-scale pilot project. This will show whether your proposed changes achieve the desired outcome – with minimal disruption to the rest of your operation if they don't.

# Act

- Next, analyze your pilot project's results against the criteria that you defined in Step 1, to assess whether your idea was a success.
- If it wasn't, return to Step 1. If it was, advance to Step 4.

# Check

- This is where you implement your solution. But remember that PDCA/PDSA is a loop, not a process with a beginning and end. Your improved process or product becomes the new baseline, but you continue to look for ways to make it even better.

## Learning Journey 3

# Begin with the End in Mind: Project Planning

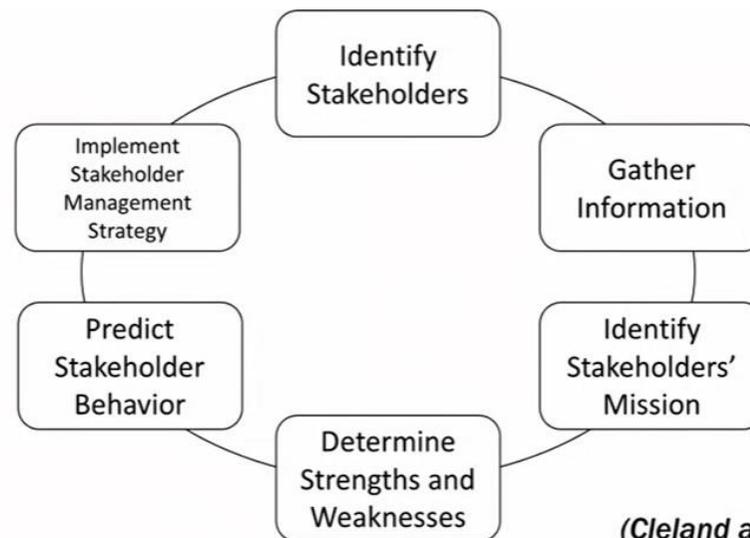
- Introduction
- What is a Project and things to do when starting a project
- Project Success factors and Characteristics
- Project Life Cycle
- Roles in Projects
- **Project Management Model**
- Project Organisation and Stakeholders
- How to prepare a Gantt Chart?
- Project meetings and review meetings
- Cost and resource control and allocation
- Budget and monitoring processes

## Begin with the End in Mind: Project Planning

- Introduction
- What is a Project and things to do when starting a project
- Project Success factors and Characteristics
- Project Life Cycle
- Roles in Projects
- Project Management Model
- **Project Organisation and Stakeholders**
- How to prepare a Gantt Chart?
- Project meetings and review meetings
- Cost and resource control and allocation
- Budget and monitoring processes

# Project Organisations and Stakeholders

- We gather information about them, and we identify their mission.
- We determine their strength and their weaknesses and especially.
- We pay attention to how those strength and weaknesses will affect our project and the success of our project.
- Then we might predict their behaviour, depending on alternative strategies that we might deploy, and
- we identify the strategy that we would like to incorporate into our project plan.



(Cleland and King, 1988)

# Begin with the End in Mind: Project Planning

- Introduction
- What is a Project and things to do when starting a project
- Project Success factors and Characteristics
- Project Life Cycle
- Roles in Projects
- Project Management Model
- **Project Organisation and Stakeholders**
- How to prepare a Gantt Chart?
- Project meetings and review meetings
- Cost and resource control and allocation
- Budget and monitoring processes

Another framework that is very popular, and widely used in project management today, is thinking about a **power interest grid**. This framework was developed quite a while ago by Ed Freeman.

Ed talks about identifying where our stakeholders fall onto main axes, power and interests.

- Are they high power or low power?
- High interest or low interest?

Once you've identify where our stakeholders fall, that will imply a certain strategy and a certain type of interaction.

For instance, stakeholders that have low power and are low interest, we just want to monitor, make sure that there is no change.

Similarly, stakeholders that might have high power and low interest, we would like to keep satisfied and we would like to keep them satisfied because the outcome of them not being satisfied is critical and important to think about.

If those stakeholders that have high power and low interest are not satisfied and they become high interest stakeholders, that is, probably, probably a signal to us that something is not going well with our project.

And therefore, if we keep them satisfied, they will remain where they are at the low interest quadrant. Some of the key projects in history that we've heard of, large scale projects that we know of that were not successful, typically fail on this idea of identifying their stakeholders and identifying their innovation properly.

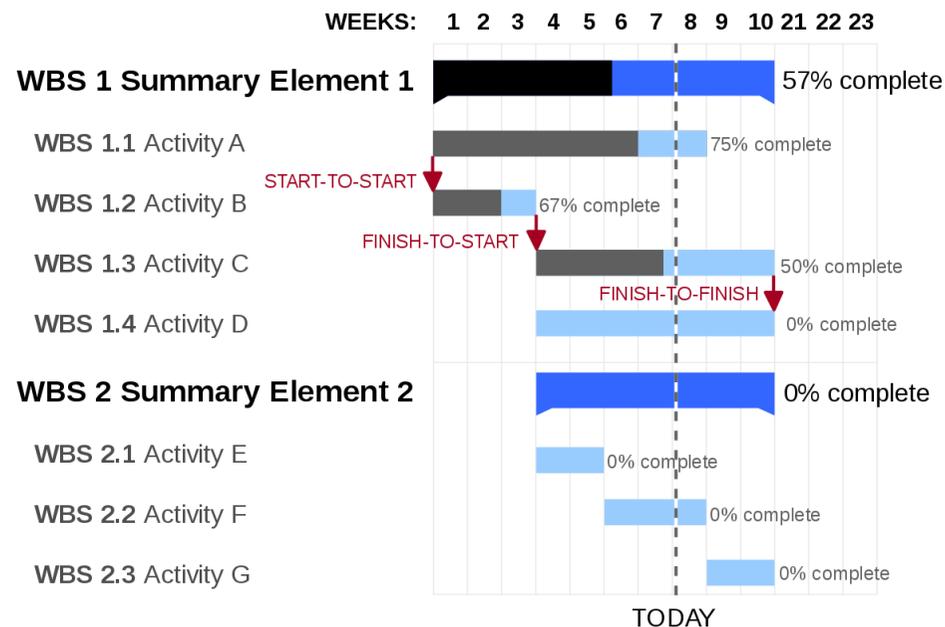
# Begin with the End in Mind: Project Planning

## How to prepare a Gantt Chart

A Gantt chart, commonly used in project management, is one of the most popular and useful ways of showing activities (tasks or events) displayed against time.

On the left of the chart is a list of the activities and along the top is a suitable time scale. Each activity is represented by a bar; the position and length of the bar reflects the start date, duration and end date of the activity. This allows you to see at a glance:

- What the various activities are
- When each activity begins and ends
- How long each activity is scheduled to last
- Where activities overlap with other activities, and by how much
- The start and end date of the whole project



- Introduction
- What is a Project and things to do when starting a project
- Project Success factors and Characteristics
- Project Life Cycle
- Roles in Projects
- Project Management Model
- Project Organisation and Stakeholders
- **How to prepare a Gantt Chart?**
- Project meetings and review meetings
- Cost and resource control and allocation
- Budget and monitoring processes

# Begin with the End in Mind: Project Planning

- Introduction
- What is a Project and things to do when starting a project
- Project Success factors and Characteristics
- Project Life Cycle
- Roles in Projects
- Project Management Model
- Project Organisation and Stakeholders
- **How to prepare a Gantt Chart?**
- Project meetings and review meetings
- Cost and resource control and allocation
- Budget and monitoring processes

## STEPS:

1. List the tasks to be performed
2. Estimate the duration of the tasks
3. Identify the dependencies between each task
4. Establish a detailed Project Schedule
5. Use a suitable tool (e.g. Microsoft Excel, A software specialized in the creation of Ganttchart, A Project management software)

## Begin with the End in Mind: Project Planning

- Introduction
- What is a Project and things to do when starting a project
- Project Success factors and Characteristics
- Project Life Cycle
- Roles in Projects
- Project Management Model
- Project Organisation and Stakeholders
- How to prepare a Gantt Chart?
- **Project meetings and review meetings**
- Cost and resource control and allocation
- Budget and monitoring processes

# Project meetings and review meetings

When working on a project, fixing the meetings to be held within the duration of the project is a crucial task. We can think of 4 different essential types of project meetings:



### Kick-off meeting

- It is held at the beginning and designed to organize every step of the process, as well as to ensure every person involved understands the objectives, procedures and plans.
- The agenda includes: Team members introduction, Project framework, Governance structure and Dispelling doubts.



### Status meeting

- It is a fundamental tool to keep the pace of the project and to assure its success. Its purpose is to systematically follow the agenda to verify everyone is completing their tasks on time and within budget, and to keep the team engaged, participating and informed about the project.



### Contingency meeting

- Although you will have planned every phase of the project, there will be many contingencies along the process. Every unplanned situation you may encounter will make you adjust your schedule and reorganize your agenda.



### Review meeting

- This is held at the end of a project, and it is the moment to itemize the strengths and weaknesses of the team. Discussing and measuring all the rights and wrongs will help you and your team enhance your performance during a future project as well as to improve your planning capabilities.
- Last, but not least, do not forget to recognize and celebrate all the accomplishments.

## Begin with the End in Mind: Project Planning

- Introduction
- What is a Project and things to do when starting a project
- Project Success factors and Characteristics
- Project Life Cycle
- Roles in Projects
- Project Management Model
- Project Organisation and Stakeholders
- How to prepare a Gantt Chart?
- Project meetings and review meetings
- **Cost and resource control and allocation**
- Budget and monitoring processes

# Cost and resource control and allocation

Cost management in project management is the science behind the planning, allocation and control of the budget for a project or an organization. It is a process that makes certain that a project would be completed within an agreed upon budget. The process involves project cost estimations and calculations, cost-tracking spreadsheet development and reviews and approvals.

## There are 4 steps to creating a Project Cost Management Plan:

1. **RESOURCE PLANNING.** The aim is to determine how much human resource, raw material, equipment and facilities that would be required to deliver on the project. At this phase, the project manager would be looking at all the physical resources necessary for executing the project.
2. **COST ESTIMATION.** This involves developing an approximate value of how much the resources identified are going to cost. The process involves identifying and examining different pricing alternatives with the aim of going with the option that is most profitable for the company without necessarily compromising on quality.
3. **COST BUDGETING.** This refers to the allocation of cost estimates to the identified project components that require a certain amount of resources. It makes use of the project schedule (where costs are allocated by time periods), work breakdown structure and cost estimates to come up with a cost baseline for the project. The cost baseline is essential for tracking project management cost during the project life cycle.
4. **COST CONTROL.** Cost control involves tracking and measuring financial variances from the cost baseline that we came up with during cost budgeting.

# Begin with the End in Mind: Project Planning

- Introduction
- What is a Project and things to do when starting a project
- Project Success factors and Characteristics
- Project Life Cycle
- Roles in Projects
- Project Management Model
- Project Organisation and Stakeholders
- How to prepare a Gantt Chart?
- Project meetings and review meetings
- Cost and resource control and allocation
- **Budget and monitoring processes**

# Budget and monitoring processes

A project budget is the total projected costs needed to complete a project over a defined period of time. It's used to estimate what the costs of the project will be for every phase of the project. The project budget will be reviewed and revised throughout the project.

## Some issues to take into account when calculating a project's budget:

How the project's costs would be continuously tracked until its completion

How the costs are spread out across multiple project phases and milestones

What tools would be used to store and report cost data

What the plan is for situations in which the project is either under or over budget

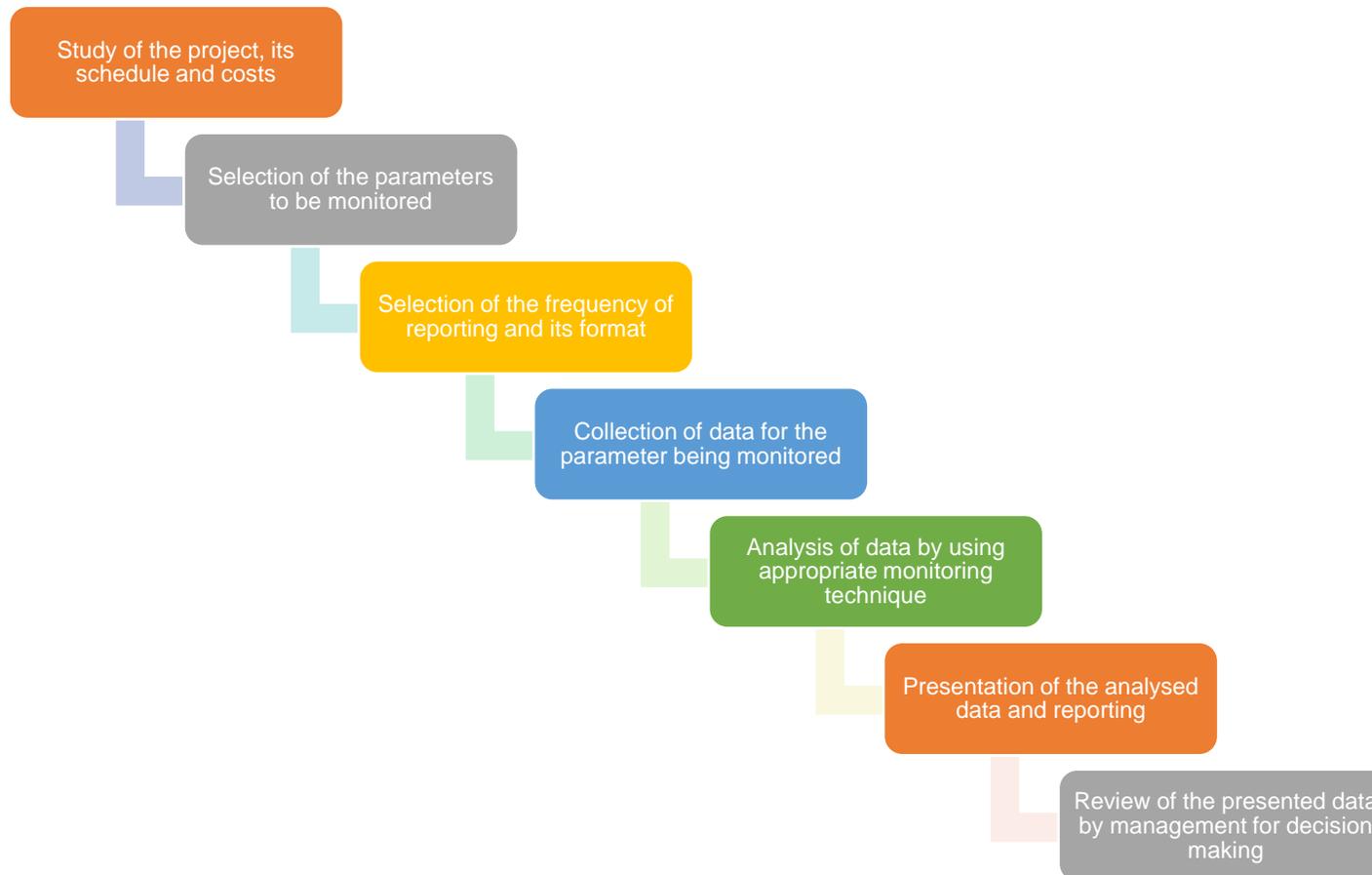
How the project's budget fits into the parent organization's overall strategy

# Begin with the End in Mind: Project Planning

- Introduction
- What is a Project and things to do when starting a project
- Project Success factors and Characteristics
- Project Life Cycle
- Roles in Projects
- Project Management Model
- Project Organisation and Stakeholders
- How to prepare a Gantt Chart?
- Project meetings and review meetings
- Cost and resource control and allocation
- **Budget and monitoring processes**

Project monitoring is defined as a process which is performed to track the progress of project execution so that potential problems can be identified well in time for the taking of the corrective actions for the purpose of controlling the execution of the project.

## Steps in project monitoring:



# Next Learning Journeys

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To continue your PRONTO Learning Journey, book time NOW to complete the following Learning Journeys and then plan your first business improvement project using the [PRONTO app](#).

In **Learning Journey 4, Implementing and Monitoring Business Improvement Projects**, you will learn more about the following tools and techniques:

- How to prepare a risk assessment and contingency plan
- How to secure the resources needed to implement the project plan
- How to use the Gantt chart to monitor project progress
- How to prepare and manage project meetings and progress reviews
- How to prepare corrective action plans in the event of a shortfall in progress or results
- How to evaluate the success and impact of the project against the project's planned objectives.



**You have completed**  
**Learning Journey 3**  
**Begin with the End in Mind: Project Planning**

Disclaimer: This project has been funded with support from the European Commission.  
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