



# UNIT-4

## Working on a Project

### Learning Outcomes

**By the end of this unit the learner will be able to:**

- ✓ Discuss your project, including goals and vision statements
- ✓ Discuss stages involved in report writing

## Unit 4

### Working on a Project

#### The Vision Process

At this stage, you've chosen a project. But do you really know what you're trying to achieve?

Try this exercise: Sit at your desk with a sheet of blank paper in front of you. In an ideal world, what would your project do? Don't think about what it can't do, or why certain things aren't possible. List all ideas and goals, no matter how lofty. You may also want to perform this activity with your project team; it will get them excited about the task ahead.

Let's say that you have an idea to implement a new sales computer program in a small chain of retail stores. What objectives can you envision for the project?

#### Sample Brainstorming Diagram



### Defining Objectives

We probably all agree that it's pretty unlikely for NASA to express interest in our new sales system and project us to worldwide fame, but what if?

Now that you've identified some things that ideally would change as a result of the project, what will be the likely change or objective? Let's think about our sample project of a new sales computer program. Some likely objectives would be:

- Our sales will likely increase, making employees happier.
- Our customer service should get better, resulting in happier customers, and hopefully contributing to more sales.
- This may eventually give us the ability to expand.

### Creating a Vision

Now let's narrow the focus down and create a vision statement. This statement should explain what will change and how it will change as a result of your project. It should also be attainable and worthwhile.

### Test your knowledge:

**Propose a vision statement for our sales project.**

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### Test Your Knowledge

**Our Project**

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**Possible Objectives**

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**Individual**

All members of a team must be involved in goal setting. Find ways for them to link into the project and get motivated. To keep everyone involved, it might be useful to keep a goal chart on the wall.

**Review**

Project goals also need to be reviewed periodically to make sure you have consensus as you move from stage to stage in a project.

**Inspiring**

Goals should be high but achievable.

**Time-Bound**

Make sure that the deadline for the goal is clear.

**Two Additional Criteria**

When we are working on projects, we have additional criteria to remember, particularly that goals must be **agreed upon** and come with **clear responsibility**.

**Test your knowledge:**

**Can you identify the goals of your project?**

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**Do these goals fit the criteria for good goals?**

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## Using a Target Chart

A target chart can help you identify the biggest priorities in your project and help you see how to achieve your goals. It looks like this:

Objective	Indicator	Priority	Current Level	Target Level

First, we'll list our objectives. These are the items that, if achieved, will mean the project has been successful. Let's look at our new sales system project as an example.

Objective	Indicator	Priority	Current Level	Target Level
Better customer service				
Happier employees				
Improve sales				

These are all good objectives, but the first two are pretty vague. That's where the next column (Indicator) comes in. How will we tell if we've been successful or not?

Objective	Indicator	Priority	Current Level	Target Level
Better customer service	Less hotline traffic			
Happier employees	Turnover reduced			
Improve sales	More add-ons sold			

Now let's identify where these objectives fall in terms of priority on a scale of 1 to 10, with 1 being minimally important to the project's success and 10 being crucial.

Objective	Indicator	Priority	Current Level	Target Level
Better customer service	Less hotline traffic	6		
Happier employees	Turnover reduced	2		
Improve up-selling	More add-ons sold	10		

Once you've identified priorities, review your objectives. Are there any that we may want to drop? In the example above, making employees happier is minimally important to the success of the project. If this can be achieved with a small amount of work (or as the result of another objective being completed), that's fine. However, if this objective will take a significant amount of time and/or resources, we may want to save it for another project.

Now we should note the current level of performance for each objective and where we would like to be.

Objective	Indicator	Priority	Current Level	Target Level
Better customer service	Less hotline traffic	6	10 per week	2 per week
Happier employees	Turnover reduced	2	Averaging 3 per month	Less than 1 per month
Improve sales	More add-ons sold	10	\$40,000 per month	\$100,000 per month

This chart should be posted where all project members can see it, to keep everyone on track.

## Preparing Your Project

### Things to Consider

Once you have decided which project to promote to others, there are some considerations you want to be prepared for.

**Test your knowledge:**

**Anticipation**

How might I plan for objections to my project idea and prepare to respond and overcome them?

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**Assistance**

There are people with expertise, skills, and resources available to me. How can I include them to help achieve the goals?

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**Location**

What places would make sense for putting these ideas and the project into the minds and hearts of your audience?

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**Timing**

In what ways could I leverage special times, days, or dates to implement this idea?

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**Precautions**

How can I evaluate and thoroughly examine this idea? How about minimizing risk and implementing safety measures to ensure success?

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**Rewards**

What shall I do to reward people involved? Rewards don't have to be financial; they could include a creative gift and details on how people, teams, and organizations can benefit from this.

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**Laying Out the Project**

**The Statement of Work**

The terms Project Charter and Project Statement of Work (SOW) are often used interchangeably. Many companies use the word Charter to refer to the document that is actually the SOW.

The Project Management Institute (PMI) uses the term **Charter** to refer to the announcement that recognizes the authority of the project manager. The **SOW**, on the other hand, is the formal project definition document. This is an important distinction between the two.

The Statement of Work is a formal project management document that establishes expectations and agreements about the project. It is not a contract; it is a tool for clarifying responsibilities and working relationships among project stakeholders.

As they work on their Statement of Work, it becomes an opportunity for individual members of the team to see if they truly understand their project. A SOW can be anywhere from one or two to 100 pages long.

The usual minimum of a SOW includes the following elements.

**Defined Purpose**

**Why are we doing this project?** The answer to this question should be clearly spelled out in this section. In addition, the business case for the project is referenced but not necessarily detailed. (If you need a business case for a project it is typically done in a separate document, often called a cost-benefit analysis.)

## Statement of Scope

What is included in this project? The statement of scope clearly describes what the project will include and any items that are seen as potentially involved but are not part of the project, or are “out of scope.” This statement is essential for the project to stay on track and budget, since other tasks, or even projects, can be related and project teams may try to delegate functions to your own project (which will put you beyond scope and probably over budget!).

### How big is this project?

Sometimes little projects, like moving offices within the same building, lead to bigger projects, like reorganizing workflow and changing storage methods. Be prepared for “project creep.” Anyone who has ever done a home renovation project knows about project creep. (You wanted a new railing on the back steps but before you could put on the railing, the step had to be repaired and painted. Then when you started to repair the step you realized it would be better to use cedar rather than spruce, so the whole step had to be torn apart. Once the step had been rebuilt, and you got the railing on, you realized the whole thing needed a coat of paint, and since you were going to paint the step and the railing, you might as well do the whole deck, and...)

## Project Deliverables

### What results are we to achieve, or what are we to produce?

This helps focus the team on outcomes. It also helps individuals and sub-teams keep on track as they learn exactly what their deliverables are and when they are due. Intermediate and final deliverables should be mentioned by name. Even regular status reports, change requests, and other reports should be specified as part of the deliverables.

### Goals and Objectives

**Specific goals** are listed, with larger goals broken into smaller goals that are all well-defined. This section will include measurement criteria, including budget criteria. (Example: New customer sales will increase by 25% within four months of introducing the new website.)

Make sure you include all aspects:

- Big Picture – Little Picture
- Corporate Goals – Departmental Goals
- Long Term Goals – Short Term Goals

### SWOT

The SOW should also briefly review the big picture in terms of the organization’s **Strengths, Weaknesses, Opportunities, and Threats** (SWOT).

The rationale for this is that projects, just like regular work, flow back into the organization in terms of what business we are in, where we are going, and how we are going to get there from here.

### **Cost and Schedule Estimates**

**Prepare a draft budget.** This section provides rough but well-researched estimates of both the costs and the schedule for the project. You should be able to answer the questions, “How did you arrive at that figure for the budget?” and “How was the deadline determined?” in this section of the SOW.

Projects are often done in addition to regular work, so having an idea of how much time, materials, and other resources are required is a very smart move. A fairly simple way of getting an idea of costs is to figure out how much time will be required and how much that person’s time costs per hour.

### **List of Stakeholders**

**Who will be involved?** Here is where you identify all the key influencers such as managers, sponsors, etc. At a minimum, you should include the names and roles of the project manager, key project team members, the sponsor, managers with an interest in the project, and the customer contacts.

### **Authority Levels**

This section has to define **who has authority for what**, and how the lines of supervision or delegation (or chain of command) have been established. This will help project team members understand the limits to their own authority, and who they need to approach for help. An organization chart or matrix that outlines the important roles and responsibilities of the project is also useful. This approach can avoid problems such as people deferring responsibility (“Oh, I thought so and so was doing that part”) or becoming territorial about parts of the project.

### **Assumptions and Agreements**

**What prior assumptions and agreements are in place?** Assumptions can limit the project, and so it is important that they are detailed here. Make sure you don’t omit anything that could impact the project. Remember that for the project to be a success, all side agreements must be agreed to in the SOW. The Communication Plan

**Who will we communicate to?** What basic reports will be produced, and how often? What meetings will be held, particularly during the planning phase? Specify the frequency and audience of all meetings and status reports. Large projects may require more detailed communication plans.

The project manager will likely be in charge of formal communication. Who needs to know and who should be kept informed periodically? While you don’t want to send information to people who won’t know what you are talking about, omitting someone from the information loop is a great way to ruffle feathers unintentionally. Try not to do this.

## Test Your Knowledge

### Individual SOW

Statement of Work  
Purpose Statement

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### Scope Statement

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### Project Deliverables

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### My project has these goals:

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**Assumptions and agreements that have already been made:**

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**My communication plan looks like this:**

Who?	What?	When?	Where?	Why?	How?

## Project Planning Worksheet

Basic Information

Name of Project: \_\_\_\_\_

**Brief Description and Overall Benefits:**

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**Project Number:** \_\_\_\_\_

**Priority Rating:** \_\_\_\_\_

**Request Date:** \_\_\_\_\_

**Other Reference Dates:** \_\_\_\_\_

**Time Management**

Time Targets: Start \_\_\_\_\_ Finish \_\_\_\_\_ Accuracy \_\_\_\_\_

**Test your knowledge:**

What are the primary objectives?

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What are the secondary objectives?

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Milestone descriptions and dates:

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Plan for time control:

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**Test your knowledge:**

Cost Controls

Budget or Estimate \_\_\_\_\_

**Cost (Budget) Milestones and Dates**

#1 \_\_\_\_\_

#2 \_\_\_\_\_

#3 \_\_\_\_\_

**Financial Benefits to be Obtained:**

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Costs include:

All External? Y/N All Internal? Y/N

**Plan for Cost Control:**

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**Test your knowledge:**

**Results Expected**

Specific objectives/results expected in order of importance

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For further details, refer to documents:

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Constraints on solutions:

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Plan for control of results:

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Plan to minimize risks:

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**Approvals**

Project Manager

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## Project Manager's Supervisor

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### Writing Reports

Often, you will need to prepare a number of reports while planning and executing your project. The purpose of a report is to convey information and ideas, and sometimes to make recommendations.

A good report is:

- Easy to understand
- Always clear
- As long as it needs to be (and no longer)
- Complete with all necessary information
- Correct

### Four Stages in Report Writing

#### Investigation

Here the purpose of the report is clearly defined. Guided by this, all necessary and relevant information is collected.

#### Planning

Information is presented in a logical sequence. The basic structure of a report looks like this:

- Introduction
- Body or Discussion
- Conclusions
- Recommendations (if you have any)

#### Writing

Information and ideas are presented clearly, concisely, completely, and correctly, using simple words in short sentences. In essence, it is written for the reader.

Here are some layout tips:

- Use plenty of space.
- Use headings that reflect what the next section contains.
- First paragraph in each section/sub-section should extend or expand the heading, followed by short, crisp, readable paragraphs.
- State facts clearly, in an unbiased manner, and describe the sources and methods used.
- Use graphics and illustrations with captions.

## Revising

Prior to final production, a thorough and relentless check is made of the first draft of the report. Check facts, length, organization, style, spelling, grammar, and punctuation.

## Basic Formats

### Indirect Approach

This approach presents the evidence in a more logical way, so that detailed recommendations come last. It is used when it is necessary to build your case, leading to controversial recommendations. A synopsis or executive summary is often used to highlight principal recommendations at the beginning of the report.

1. Executive Summary
  - Major results/findings
  - Principal recommendations
2. Introduction
  - Statement of the problem
  - Purpose of the report
  - Background
  - Methods used
  - Organization of the report
3. Body/Discussion
  - Results/findings
  - Analysis of results
  - Alternative solutions
4. Conclusions
  - Relate to body
  - Most important first
5. Recommendations
  - List in order of importance

### Direct Approach

In this approach, you deliver your recommendations up front and save the summary for last.

1. Recommendations
2. Introduction
3. Body/Discussion
4. Conclusions
5. Executive Summary

**Further Reading:**