

Pathways to Management and Leadership

Level 5: Management and
Leadership

Unit 5006V1

Conducting a Management Project

Pathways to Management and Leadership

Unit 5006V1: Conducting a Management Project

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Conducting a Management Project

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About this workbook

The unit

The main purpose of this workbook is to support you as you study for the Chartered Management Institute Level 5 in Management and Leadership qualifications, so it specifically focuses on the content of the syllabus for Unit 5006V1 *Conducting a Management Project*.

This workbook provides underpinning knowledge and develops understanding to improve your skills as well as to prepare you for future assessment. If you are studying for the Level 5 in Management and Leadership qualifications, then you will be assessed by your approved centre on 'your knowledge and understanding of' the following learning outcomes:

1. Be able to identify and justify a management project.
2. Be able to conduct research using sources and analyse data and options.
3. Be able to make conclusions and recommendations that achieve the project aim.
4. Be able to show and review the results of the project.

The aims of this workbook

This workbook aims to help you learn how to:

- identify a management area for investigation
- conduct research and analyse data
- evaluate the research and make conclusion and recommendations for implementation
- review the results of the project and assess impact

Syllabus coverage

The table below shows which sections of the workbook address each of the assessment criteria of the qualification syllabus.

Unit 5006V1 syllabus coverage	Addressed within section:
Conducting a Management Project	
1.1 Determine a management area for investigation that has an implication for a work-related area	1
1.2 Identify the aim, scope and objective of the project	1
1.3 Justify the aim and objective of the project	1
2.1 Identify sources of data and information for the project	2
2.2 Analyse the data and information for options or alternatives that meet the project aim	2
2.3 Determine an option or alternative that meets the project aim	2
3.1 Evaluate the research to make conclusions	3
3.2 Recommend a course of action to meet the project aim	3
3.3 Assess the impact of the project recommendations	3
4.1 Determine the medium to be used to show the results of the project	4
4.2 Produce the results of the project	4
4.3 Discuss the impact of the project on the work related area	4

Getting started

Conducting a management project is an opportunity for you to 'make a difference' to your organisation. You will have an opportunity to:

- identify a management area for investigation
- understand why this needs to be improved
- prepare a business case or proposal for the change
- research and investigate the management area using a variety of techniques
- analyse your data and consider options and alternatives
- draw conclusions and make recommendations for change and improvement

- gain approval for implementation from stakeholders
- plan and manage the implementation
- review the results of the project
- present the results to stakeholders
- evaluate the impact of the management project.

Having undertaken all the above, you will be in a position to demonstrate you have 'made a difference' to the performance of your organisation.

On the way you will have applied some key skills and this workbook will offer guidance and advice in applying those skills.

This workbook assumes that the management project will be implemented and the results reviewed and evaluated.

How to use the workbooks

The workbooks provide ideas from writers and thinkers in the management and leadership field. They offer opportunities for you to investigate and apply these ideas within your working environment and job-role.

Structure

Each workbook is divided into sections that together cover the knowledge and understanding required for that unit of the Chartered Management Institute Level 5 in Management and Leadership. Each section starts with a clear set of objectives that identify the background knowledge to be covered, and the management skills in the workplace that enable you to demonstrate this knowledge. You do not have to complete the sections in the order they appear in the workbook, but you should try to cover them all to make sure that your work on the unit is complete. There are self-assessment questions at the end of each section that allow you to check your progress. You may want to discuss your answers to these questions with your line manager or a colleague.

Activities

Throughout the workbooks there are activities for you to complete. These activities are designed to help you to develop yourself as a manager. Space is provided within the activities for you to enter your own thoughts or findings. Feedback is then provided to confirm your input or to offer more ideas for you to consider.

To get the best from the workbooks, you should try to complete each activity fully before moving on. However, if the answer is obvious to you because the issue is one you have encountered previously, then you might just note some bullet points that you can then compare quickly against the feedback. You may sometimes find it difficult to write your complete response to an activity in the space provided. Don't worry about this – just

keep a separate notebook handy, which you can use and refer to as needed.

Try not to look at the feedback section before completing an activity. You might like to try covering up the feedback with a postcard or piece of paper while you are working through an activity.

Timings

Timings are suggested for each section and activity, although it is important that **you** decide how much time to spend on an activity. Some activities may occupy only a few moments' thought, while others may be of particular interest and so you might decide to spend half an hour or more exploring the issues. This is fine – the purpose of the activities is to help you reflect on what you are doing, and to help you identify ways of enhancing your effectiveness. It is always worth writing something though, even if it's brief – the act of writing will reinforce your learning much more effectively than just referring to the feedback.

Scenarios

There are scenarios and examples throughout each workbook to illustrate key points in real workplace settings. The scenarios cover a wide range of employment sectors. As you work through, you might like to think of similar examples from your own experience.

Planning your work

The reading and reflection, scenarios and activities in each section of the workbooks are designed to take around two hours to complete (although some may take longer). This is a useful indicator of the minimum length of time that you should aim to set aside for a study session. Try to find a quiet place where you will not be interrupted and where you can keep your workbooks, notes and papers reasonably tidy. You may also like to think about the time of day when you work best – are you a 'morning person' who likes to get things done at the start of the day, or do you work better in the evening when there may be fewer disturbances?

Preparing for assessment

Further information on assessment is available in the Student Guide produced as part of the *Pathways to Management and Leadership* series. If you have any further questions about assessment procedures, it is important that you resolve these with your tutor or centre co-ordinator as soon as possible.

Further reading

Suggestions for further reading and links to management information are available via ManagementDirect through the Study Support section of the Institute's website at

<http://mde.managers.org.uk/members>. Alternatively, email ask@managers.org.uk or telephone 01536 207400. You will also find titles for further reading in the Bibliography at the end of this workbook.

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Section 1 Identifying and justifying a management project

Time required: about 2 hours

Learning outcomes

By the end of this section you should be able to:

- 1.1 Determine a management area for investigation that has an implication for a work-related area
- 1.2 Identify the aim, scope and objective of the project
- 1.3 Justify the aim and objective of the project

The Chartered Management Institute has produced two useful checklists on managing projects:

- Checklist (035): Managing projects
- Checklist (197): Participating in projects.

What are you going to investigate?

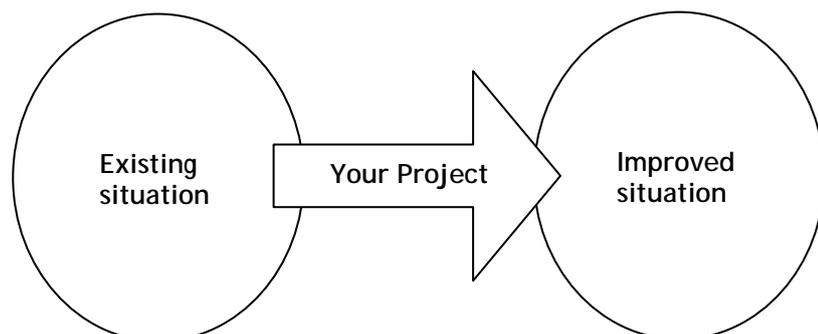
The management project is an opportunity to undertake a study of one of the following:

- a 'problem' you or your organisation is experiencing
- an 'issue' that is currently affecting you or your organisation in some way
- an 'opportunity' to improve an aspect of work in some way.

Therefore, what you're going to study in this unit will be driven by you identifying one of the above and investigating how it can be addressed. Once you've determined the area for investigation you can formalise your plans into a proposal or business case.

This will contain the project aim, scope and objectives. You will probably have to communicate this proposal or business case to key stakeholders and gain their commitment to undertake the project.

Projects often relate to the 'gap' between the existing situation and an alternative improved situation.



Your project becomes a process for managing the change between the two situations.

Activity**Activity 1.1****(about 10 minutes)**

Think about your current role and organisation, and identify:

- a current management-related 'problem'
- a typical management 'issue' you face on a regular basis
- an opportunity to improve an aspect of management.

From your list select one and then briefly define:

- the existing situation – what is working/not working?
- the alternative or improved situation – what would it look like?

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Feedback

You may have found it challenging to differentiate between a management 'problem' and a management 'issue'. This is understandable and not critical at this stage. Management 'problems' are often ones that have been around for a while and often have multiple causes.

For example, there may be a problem with poor performance caused by a number of factors such as difficult market conditions, lack of training, demotivated people or incorrect performance measures. In your project you may want to focus on the problem as a whole and investigate the causes or tackle a specific cause. Problems often affect the whole organisation.

Management 'issues' tend to be more current and often relate to recent changes affecting the organisation. Issues can often relate to a particular team or function only. For example, there may be an issue with the length of time the finance team takes to process supplier payments as a result of a new IT system being introduced. Your project might want to investigate how this process could be improved and delays reduced.

Management 'opportunities' tend to be more positive in outlook and take the view that something may be improved as a result of undertaking change. For example, there may be an opportunity to develop a new service for customers. Your project could investigate how this service could be introduced and what the benefits would be in terms of revenue and profit.

Your assessment of the current situation should identify what needs to be investigated and changed and your assessment of the improved situation should help you think about how you might get there.

Where do project ideas come from?

Knutson (2001) suggests that project ideas come from two different sources:

- strategic or top-down projects that are driven by senior management
- bottom-up projects that are based on ideas generated by people close to the work.

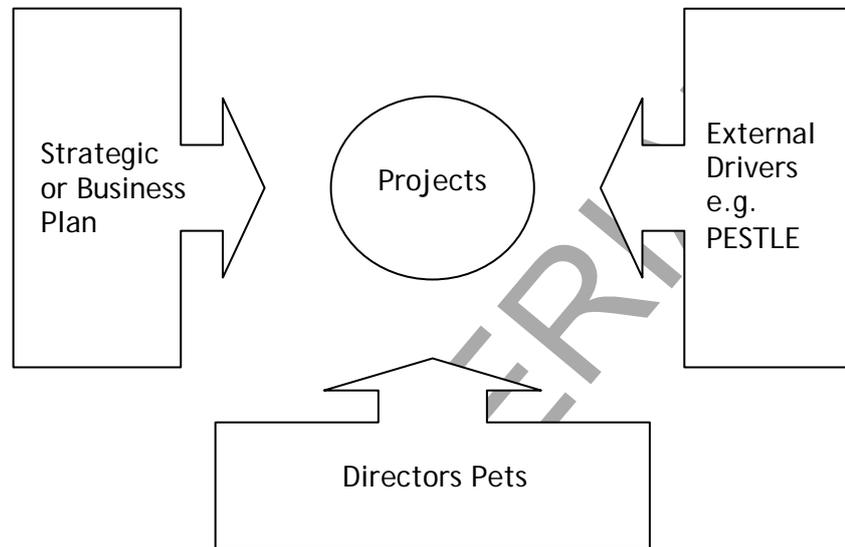
She goes on to suggest that there may be a third source – projects pressed on an organisation by its customers.

For your project idea one of these categories might be relevant. You might want to:

- talk to your boss and ask if there are any potential project ideas that they are aware of that might benefit the organisation
- consult with your team and/or colleagues to ask for suggestions for improving an aspect of their work – these could relate to process or procedural improvements

- speak to customers or suppliers (internal and external) and ask them for any suggestions for improving working practices between your organisations.

Michael Holton (2002) in *Project Management Pathways* (The Association for Project Management) proposes that there are three sources of projects, as shown below.



Source: Adapted from Michael Holton, *Project Management Pathways*, The Association for Project Management, 2000, pp. 10–21

- The strategy or business planning source: It may be that project ideas emerge from strategic or business planning. These are either problem-solving or opportunity exploitation orientated and there may be an element of planning already in place.
- External drivers: It may be that the organisation needs to respond to an external driver or pressure. The PESTLE framework can often help explain the sources of these external drivers.

External factor	Example
Political	National or regional government policy decisions, e.g. congestion charging in cities
Economic	The current economic climate and how it affects decision-making, e.g. interest rates
Social	Relating to people and how they live and work, e.g. flexible working
Technological	The introduction of new technology and its associated impact, e.g. mobile broadband access

External factor	Example
Legislative	Legislation that relates to issues of ensuring compliance, e.g. the European Directive 2000
Environmental	Legislation and policies that relate to how environmentally compliant an organisation is, e.g. recycling

- Director's 'pets': It may be that someone within senior management has a particular interest in ensuring a project is investigated and implemented. For example, to automate the customer complaint resolution process. This interest may not be part of the strategic or business plan.

Activity

Activity 1.2 (about 10 minutes)

1. In your organisation what are the key focus elements of the current strategy or business plan? Do you know of any project planning that relates to this?

2. What dimensions of the PESTLE framework do you feel may be impacting on the organisation at the moment?

3. What problems/issues/opportunities have you heard your manager or other senior management members discuss (that are not part of the strategy or business plan)?

From the above what potential project ideas emerge?

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Feedback

This activity may have helped you identify potential project ideas. If you struggled to answer any of the questions it might be helpful to sit down with your manager or mentor and ask their opinion. You should be aware of organisational strategy and business planning and should be able to recognise current PESTLE factors affecting your organisation. It's often helpful to have an understanding of what other managers see as problems or opportunities – they may highlight a good project idea!

Some important questions

You might now be in a position where you have an idea for a potential project. It's worthwhile at this stage asking the following three questions:

- How suitable is the project idea?
- How practical is the project idea?
- How risky is the project idea?

How suitable is the project idea?

There's not much point taking on a project that you don't find interesting or motivating. There should also be a benefit to you and your organisation. There should also be some link to management ideas and concepts. Otherwise you may find the assessment part of this unit difficult.

In their book *No Sweat* (1998) Ray Irving and Cathy Smith suggest the following tips for identifying a suitable project idea:

- Look back over previous assignments – where have you received your best marks?
- Monitor what's going on in the media for articles or comments that might indicate research ideas.
- Think about your career. Could you link the project to a change you would like to make in this area?
- Are you a member of a professional organisation or association? By attending events you may be able to pick up ideas from other members which can often be a good source for research activities.
- Is there something new happening at work that you would like to work on? Can you act as an internal consultant?

Once you have a rough idea of a topic they suggest the following questions:

- Does it interest me?
- How much do I know about the subject already?
- Is it worth doing?
- Is the subject well enough developed for me to write about it?