

# Pathways to Management and Leadership

Level 5: Management and  
Leadership

Unit 5009V1

Project Development and Control

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## Unit 5009V1: Project Development and Control

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Northants NN17 1TT.

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Author: Corinne Leech  
Series consultant: Merritt Associates  
Consultants: Graham Hitchcock  
Bob Croson  
Project manager: Sid Verber  
Editor: Lyn Ward  
Page layout by: Decent Typesetting

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Revision author: Ray Rowlings  
Series consultant: Merritt Associates  
Editor: Suzanne Pattinson  
Proof reader: Rebecca Norman  
Page layout by: Decent Typesetting

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# Project Development and Control

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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 5009V1 *Project Development and Control*.

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 the components of project stages and lifecycle.
2. Understand project methodologies and their application.
3. Be able to develop a project plan, identify and mitigate risks
4. Be able to construct a monitor and review strategy.

## The aims of this workbook

This workbook aims to help you learn how to:

- identify the scope and boundaries of project management
- develop a project strategy
- develop a set of success criteria for a project
- describe the fundamentals of a business case for a project
- establish suitable project monitoring and reviewing processes and procedures.

## Syllabus coverage

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

Unit 5009V1 syllabus coverage	Addressed within section:
<b>Project Development and Control</b>	
1.1 Describe the component stages of a project	1
1.2 Define a project lifecycle from conception to commissioning or hand over	1
1.3 Assess where projects fit in operational management activities	1
2.1 Discuss standard approaches available to manage projects	2
2.2 Describe the process of developing an effective project management environment	1
2.3 Discuss identification of and communication with all project stakeholders	1
2.4 Identify the fundamentals of a business case to support a project	3
3.1 Design a project plan to achieve a specified objective	2
3.2 Identify the financial components including risk appraisal, which need to be developed for effective project design and control	3
4.1 Construct a monitoring and review strategy for the project that assesses the impact and achievement of the project	4

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## Getting started

A project usually starts with an idea. Somebody, somewhere in the organisation, gets an idea about something that is not happening at the moment, but looks as though it might be worth doing. It could be a small idea, such as:

'Perhaps we could set up some kind of car-share scheme and get more people into work when there's a tube strike.'

Or it could be a very big idea: 'If we invest in the development of this new vegetable protein now, we could be world leaders in three years' time.'

Some projects never get further than the ideas stage. However, assuming a project does get off the ground, there will soon come a point when one individual, the project manager, is given the task of turning the idea into a reality. In order to do this, the manager needs resources. These can take a variety of forms. For example, all the car-share scheme might require are:

- an eye-catching poster for the staff noticeboard
- some guidance from an insurance company
- a couple of hours' time to match lifts and passengers, and to keep participants informed
- access to a computer to email or write memos to the participants.

For the development of a totally new product, requirements might include:

- a major financial investment from shareholders
- a team of food scientists with specialist skills and a trained workforce to support them
- a market research report
- a new factory equipped with machinery.

Whatever the scale of the project, it is the project manager who is largely responsible for identifying the necessary resources, making sure that they are used effectively and ensuring that the project objectives are achieved. This workbook describes the skills, techniques and considerations involved in successful project management.

## 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 cover 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's 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](mailto: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 Project strategy and lifestyle

Time required: about 4 hours

## Learning outcomes

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

- 1.1 Describe the component stages of a project
- 1.2 Define a project lifecycle from conception to commissioning or hand over
- 1.3 Assess where projects fit in operational management activities
- 2.2 Describe the process of developing an effective project management environment
- 2.3 Discuss identification of and communication with all project stakeholders

The Chartered Management Institute has produced two useful checklists on project management:

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

## What is a project?

You have probably already managed or participated in several projects.

### Activity

#### Activity 1.1

(about 1 minute)

Imagine that your manager asks you to come and have a few words in their office. Your manager says 'I've got a project here that I think may interest you' ... and slides a folder across the desk towards you.

Before you open the folder, what is your instant, unspoken reaction? Note it down here.

### Feedback

*Typical reactions in this situation might include:*

- 'This sounds exciting!'
- 'This could be a break from routine.'
- 'Oh good, a chance to show what I'm capable of.'
- 'On top of everything else I've got on my plate at the moment? You must be joking.'

*Whether your first reaction is positive or negative will probably depend on your previous experience of working on projects in your organisation. You will realise that you are being given responsibility for something that is outside your normal workload. Projects are non-routine, by definition. They also have certain other characteristics.*

### Specific outcomes

Projects can be set up to achieve many different things, but in every case, after a project has finished, something exists that wasn't there when it started. Sometimes, the outcome of a project has a physical form, such as a completed building, a new product or a printed report. A project can also have a less tangible outcome, such as raised public awareness of a particular issue.

### Instruments of change

Projects are a way of bringing about change. They are used to develop new products and systems, or to alter the physical, social or cultural environment. The word 'project' is actually derived from the Latin verb *proicere*, which means 'to throw forward'. A project is a leap into the future.

### Sequence of tasks

A project always involves a sequence of activities that demand different resources and skills. The construction of a building, for example, uses the skills of surveyors, architects, bricklayers, plumbers, carpenters, electricians, painters and decorators at various stages of the process.

### Resource use

In a project, resources are brought together to achieve a particular aim. This combination of resources is unique to the project. In a project of any size, these resources invariably include people with a variety of different skills. They may also include information, time, equipment, materials, services, finance and energy.

### Limited time span

Every project has a definite beginning and end. Depending on the scale of the project, these points may be only a few hours or days apart, or they may be separated by several years. The outcomes a project was designed to produce usually outlast the project itself.

### Responsibility

Projects need firm direction and leadership. For this reason, the responsibility for a project is usually given to a single individual or agency, who usually makes a personal and professional commitment to its successful completion. A small project may be

given to someone in addition to their everyday work. A large project will require the appointment of a dedicated project manager.

We can now put these characteristics together to form the following definition of a project:

*A project is a connected sequence of activities involving a range of resources, designed to achieve a particular outcome and frequently used as an instrument of change. It takes place within a defined period of time and is the responsibility of a single individual or agency.*

### Activity

#### Activity 1.2

(about 10 minutes)

Think of something you have been involved in that you think could be described as a project.

1. What outcome was it designed to achieve?
2. What changed as a result of the project?
3. What resources were brought together for the project?
4. What sequence of activities was involved?
5. What was the time span?
6. Who was responsible for the project?

### Feedback

*Your response to this activity will depend on the particular nature of the project you were thinking of, but you should have been able to answer all, or almost all, of the questions. If you couldn't, are you absolutely sure it was a project? Check through the characteristics again.*

## What makes a successful project?

Elbeik and Thomas (1998) identified ten key requirements of a successful project. These included, in order of priority:

1. clearly defined objectives
2. good planning and control method
3. good quality of project manager
4. good management support
5. enough time and resources
6. commitment by all
7. high user involvement
8. good communications
9. good project organisation and structure
10. being able to stop a project.

### Activity

#### Activity 1.3

(about 15 minutes)

Select a project you have either managed or been closely involved in.

How would you rate each of the Elbeik and Thomas requirements on a scale from 1 (very poor) to 10 (very good)?

Elbeik and Thomas's successful project requirements	Your rating
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Now consider the success of the project. Can this be explained by whether or not the requirements were met?

**Feedback**

*You would expect a project with a successful outcome to have high scores on the higher-priority requirements. If your experience does not reflect this, it was probably due to the specific circumstances of the project, rather than being a reliable method of managing projects in the future.*

## The project life cycle

The starting point for a project is when a need is identified. The need may be part of the cycle of continually improving a product or service. Alternatively, a need may be identified when an organisation realises that it has a problem of some kind, such as falling sales figures, an aggressive competitor, inadequate accounting procedures, high staff turnover or perhaps a poor health and safety record. Once the problem is recognised, alternative solutions can be considered and evaluated in a feasibility study, and a particular course of action, which may take the form of a project, can be recommended.

**Activity****Activity 1.4****(about 5 minutes)**

Think back to the project you analysed in Activity 1.2. What was the basic need driving the project? Was it set up to solve a problem? If so, what was the problem?

**Feedback**

*Many projects quickly gather their own momentum and are viewed as completely positive developments, not as reactions to a problem. However, unless a project meets a genuine need, it is unlikely to succeed.*

Once a project has been agreed upon, it goes through a series of stages, known as the 'project life cycle'. These stages include:

- project start-up, often in the form of a feasibility study
- planning and organisation – how are we going to do it?
- implementation with monitoring
- completion and evaluation – how did it go (and how could we do it better next time)?

Projects vary enormously in their size and complexity. However, every project, whatever its size, should go through these stages. The staffing and resource requirements throughout the project tend to follow the pattern shown in Fig. 1.1.

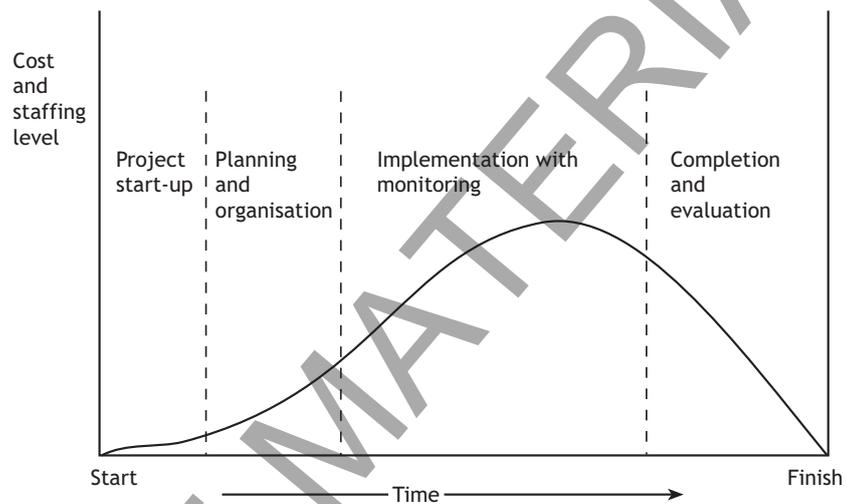


Fig. 1.1: A typical project life cycle

### Activity

#### Activity 1.5

(about 5 minutes)

Choose an example of a small project that you have been involved in. What happened at the various stages?

1. Project start-up
2. Planning and organisation
3. Implementation with monitoring
4. Completion and evaluation