Pathways to Management and Leadership

Level 5: Management and Leadership

SAMPLE

Unit 513

Managing Projects to Achieve Results

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Contents

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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 qualification — Management and Leadership, so it specifically focuses on the content of the syllabus for Unit 513, Managing Projects to Achieve Results. This is about the way in which you lead and motivate your team to achieve organisational goals.

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

1. Understand the role of projects in delivering organisational strategy

2. Understand processes for initiating, planning and managing projects

3. Understand the factors which contribute to effective project management

The aims of this workbook

This workbook aims to help you learn how to:

- Effectively plan, create and deliver projects successfully

- Identify and work with stakeholders ensuring the project team is well-briefed and takes ownership

- Ensure the exchange of data is effective and transparent

- Consider risks and plan mitigations. Be ready for the unknown.

This workbook is about how you can manage projects effectively, getting the best from the project team and how you will overcome problems and challenges together.

It also considers the project team's development needs and the importance of effective communication.

Syllabus coverage

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

Unit 513: Managing Projects to Achieve Results Syllabus coverage		Addressed within section
1.1	Analyse the role of projects in delivering organisational strategy	1
2.1	Analyse the process for initiating projects	2
2.2	Examine the impact of legal, organisational and ethical factors on projects	2
2.3	Discuss the use of tools and techniques to plan and manage projects in different contexts	2
2.4	Analyse techniques for working collaboratively with stakeholders to achieve project aims	2
2.5	Evaluate methods used for monitoring project progress	2
2.6	Discuss methods for reporting on project outcomes	2
2.7	Assess approaches for project closure	2
3.1	Discuss methods of managing data and information in a project environment	3
3.2	Assess the use of problem solving and decision making techniques when managing projects	3
3.3	Examine approaches to identify, manage and mitigate project risks	3

Getting started

Managing projects effectively is an essential skill for managers regardless of whether there is a dedicated project management team, or project management office, within the organisation.

In order to manage projects effectively to achieve results, the project owner and project team are required to fully understand the objectives of the project, scope the project and be fully aware of the project's resources, the resource expertise and the potential risks. Once risks are understood the project team is required to formulate risk mitigation and contingencies to facilitate a successful project outcome.

Project management methodologies should be clearly defined and understood by the whole team; and each team member should have a clear understanding of the anticipated project success – what does success actually look like?

The project team should adopt a clear methodology for project initiation, planning, task ownership, resource allocation, managing, communicating and reporting on the project.

The project team are also required to have a clear communications strategy encompassing internal team members, customers, suppliers and other external stakeholders.

As such multiple disciplines are utilised throughout holistic project management.

Regardless of the outcome of the project, i.e. successful or unsuccessful, the team should complete a project postmortem, or project post-implementation review. In effect, the team should conduct, complete and disseminate a lessons-learned exercise.

How to use the workbook

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 jobrole.

Structure

Each workbook is divided into sections that together cover the knowledge and understanding required for that unit of Level 5 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 the self-assessment 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 Qualification Support section of ManagementDirect, CMI's online resource portal. 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. You will also find titles for further reading in the Further Resources at the end of this workbook.

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Section 1 Understand the role of projects in delivering organisational strategy

Learning outcomes and assessment criteria (about 2 hours)

By the end of this and the next section you will understand the role of projects in delivering organisational strategy and you will understand the processes for initiating, planning and managing projects.

In this section you will be able to:

1.1	Analyse the role of projects in delivering organisational strategy

To start with, we should set the scene and consider:

1. What is a project?
2. Project versus 'business as usual'
3. When is a project considered successful?
4. What is project management?
5. Understanding the role of projects in delivering organisational strategy.

What is a project?

We should consider what a project actually is.
The Association of Project Management states "a project is a unique, transient endeavour, undertaken to achieve planned objectives, which could be defined in terms of outputs, outcomes or benefits"
www.apm.org.uk/body-of-knowledge/context/governance/project-management/

So, a project is typically a time-limited activity with the objective of delivering specific outcomes, with specific agreed resources.

Projects versus 'Business as Usual'

A project is typically a temporary activity, which could be unique. It is often supporting some form of organisational change and perhaps is addressing an uncertain situation.

A project will often operate cross-functionally in order to capture the appropriate breadth of expertise needed to facilitate a successful project outcome - a pre-agreed definition of success.

In contrast, 'business as usual' typically refers to activities which are routine. Activities which are considered as normal operation, that sustain the organisation's operations. Business as usual activities will have clarity of purpose, often with documented standard operating procedures.

As projects come to a successful conclusion, and after a post-implementation review has been completed, they will often transition to 'business as usual' and thus become standard activities within the operation.

When is a project considered to be successful?

If we are to utilise projects to deliver improvements to operational and/or strategic organisational performance, then the success criteria of a project must be agreed and widely understood, with complete clarity.

The Association of Project Management states "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" www.apm.org.uk/body-of-knowledge/context/governance/project-management/

It is essential to invest time and effort in scoping and agreeing the project success criteria avoiding disputes at a later stage.
This is an important point which cannot be over-stated.

What is project management?

It is worth considering the discipline of project management at this point, although project management methodologies will be discussed later in section 2.

ManagementDirect states "Project management involves the co-ordination of resources to complete a project within planned time and resource constraints and to meet required standards of quality. It includes planning and allocation of resources and may make use of specialised management techniques for the planning and control of projects. Projects are usually considered successful if they meet pre-determined targets, complete the intended task, or solve an identified problem without exceeding time, cost and quality constraints."

Similarly, the Association of Project Management states "project management is the application of processes, methods, knowledge, skills and experience to achieve the project objectives".www.apm.org.uk/body-of-knowledge/context/governance/project-management/

If we are to operate and deliver successful projects, then the project team must become familiar with a project management methodology which is applied consistently and competently, both within the project team and cross-functionally across the organisation.

Some organisations will benefit from a specialist project management office, typically for a large project, whilst others will adopt a more generalist approach through integrating project management into existing job functions. Both approaches can work effectively providing a project management methodology is applied competently, and the team work together and communicate effectively with stakeholders.

A specialist project management office is often created when the scale of the project justifies specialist dedicated resources, or where the projects are of such a strategic nature that dedicated specialist resources are a prerequisite to success.

Understanding the role of projects in delivering organisational strategy

Given the definitions and explanations above, properly scoped and resourced projects with agreed and defined success criteria are effective tactical components of delivering an organisation's strategy.

This is a fairly wide-ranging statement which comprises:

1. Achieving competitive advantage
2. Facilitating innovation
3. Supporting decision making
4. Enabling and managing change.

The application of project management can effectively support and develop the organisation's strategy. A properly applied project management methodology will focus resources on the correct activities at the correct time in alignment with the allocated budget.

This approach can support the components of organisational strategy illustrated in the four bullets above, either as stand-alone projects, or as components of larger strategic initiatives.

Seven strategic models are mentioned later in this section. Such models should be used to map internal and external drivers of the project, ensuring there is a breadth and depth of awareness.

For example, the PESTLE model can be quite useful to map political, economic and legal external factors, complemented by social, technology and environmental internal drivers.

For reference, drivers are not necessarily only external or internal and consideration should be given to both types during mapping and scoping exercises.

Project - Programme - Portfolio and Project Life Cycle

From a strategic perspective, we should consider the inclusion of projects, programmes, portfolios and project life cycles within the tactical and operational activities supporting the organisational strategy. Therefore, the following statements may be helpful: