



Australian  
Institute of  
Management



*Workbook*

# **INTRODUCTION TO PROJECTS**

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## **AIM - MANIFESTO**

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### **To the managers and leaders of today and tomorrow.**

You are the drivers of change.

You have the power to change the world, for better or for worse.

Be big. Be bold. Be brave.

Don't stand still.

Don't blend in.

Don't be a passenger.

Love what you do.

Serve the greater good.

Make the world a better place.

Improve the lives of the people around you and people around the world.

Your decisions and actions have far-reaching consequences.

Therefore, be of the highest integrity.

Be true, be authentic, be genuine.

Be a lifelong learner. Continually seek knowledge to succeed.

Inspire yourself and those around you.

Pursue big dreams, realise big ideas.

Aim to be the best you can possibly be.

**AIM HIGH.**

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# Introduction

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This program provides you with an overview of the tools, techniques and resources you need to plan, develop and implement projects. Covering the phases of the project lifecycle, it provides insight into project planning, budget preparation, stakeholder management, schedule management, and project closure and review.

## Learning Outcomes

- Define and document project objectives, deliverables, timeframes and resources
- Identify and respond to stakeholder needs
- Manage project scope, task allocation and risk
- Monitor project performance
- Evaluate and report on project outcomes

## Assessment

The assessment for this program involves the completion of tasks and a third party report. These tasks are listed in the Assessment Task Summary at the back of this workbook.

This program is aligned to the following unit of competency from the Business Services Training Package:

BSBPMG522 Undertake project work

# Project Management

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Projects are required in organisations when a closely managed and organised change needs to occur that essentially does not disrupt the normal business operations and processes.

Every manager will, at some point, be involved in a project either as a manager or as part of the project team. As a manager you must be able to:

- create clarity around project goals, deliverables, accountability and timeframes
- manage stakeholder needs and expectations
- utilise project planning to ensure deliverables are managed effectively
- utilise team member strengths and capabilities when planning work
- monitor execution and manage any resulting variances
- close the project once outcomes have been delivered.

## What is a Project?

A major source of knowledge on project management is published by the Project Management Institute (PMI) and called the Project Management Body of Knowledge Guide (PMBOK® Guide – Fifth Edition). According to this guide, a project is:

‘...a temporary endeavour undertaken to create a unique product, service or result. The temporary nature of projects indicates that a project has a definite beginning and end. The end is reached when the project’s objectives have been achieved or when the project is terminated because its objectives will not or cannot be met, or when the need for the project no longer exists.’

*PMBOK® Guide 2013 p. 3*

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## What is Project Management?

Project management is the act of defining, planning and coordinating people, tasks and interdependent variables in order to produce a defined change or desired outcome.

It specifically comprises:

- **Skills:** specialist knowledge and abilities
- **Tools:** management resources including plans, registers, and templates
- **Processes:** techniques and approaches.

The phrase 'Management by Projects' refers to the adoption of project management principles as an approach to managing an organisation.

While every project team member contributes to managing a project, the ultimate responsibility lies with a project manager who is accountable for successfully achieving the project objectives.

Being a project manager involves:

- identifying requirements
- establishing clear and achievable objectives
- balancing the competing demands for quality, scope, time and cost
- managing the expectations of various stakeholders
- adapting plans to overcome challenges.

### Activity: Your project experiences

What types of project have you been involved in? Describe one of these projects. What was your role? What did the project aim to achieve? Did it meet its aims? Why or why not?

## Project Management Approaches

For projects to achieve their objectives they need to be managed and controlled. The skill of managing projects is predicated on a single point of accountability for the project's success – the project manager.

One of the most important aspects of effective project management is the need for rigor; that is, robust processes and procedures and clearly defined management practices to ensure that projects deliver desired outcomes within time and cost constraints to the expected standards.

Whilst many organisations/groups follow their own, internally developed processes, many others adopt proven methodologies to deliver projects. The most commonly used frameworks include:

- **PRINCE2® (PROjects IN a Controlled Environment v2)** – is a methodology developed by and used extensively within the UK and more recently Australia. Increasingly used by organisations across industries, PRINCE2® offers best-practice guidance on managing projects.
- **ISO 21500:2012** – is a collection of concepts and processes considered to form the basis for good practice in project management.
- **Agile Project Management** – is an elaborative methodology developed by and used most widely within the IT industry. Most commonly referred to simply as 'Agile', this framework is considered especially effective for projects where the end result can be difficult to define at the project's commencement.
- **PMBok** – is the Project Management Institute's Project Management Body of Knowledge® which provides a lifecycle approach that can apply equally well to projects of all sizes and complexities. PMBoK focuses on practical tools and techniques for managing projects and draws on the strengths of other frameworks to provide best-practice guidance in project management.

### Discussion: Approaches to project management

Which project management approach is used in your organisation? If you don't follow one of the approaches listed, how do you manage projects? What tools, processes and techniques do managers of projects apply?



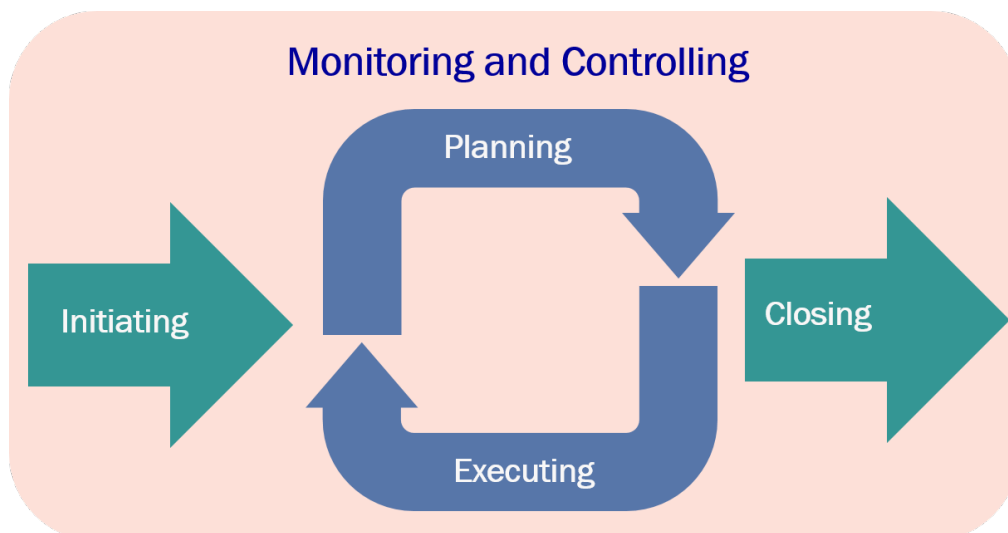
## Project Lifecycle

It is helpful in understanding projects to think of the project activity from start point to end point as a 'project life cycle'. In simplified terms, some activities are done at the start, some in the middle and some at the end. Of course in real life, projects quickly become more complicated and activities undertaken at the middle or end can necessitate a return to the beginning.

Many organisations develop their own project management framework and expand this basic idea to suit their needs. Many project methods define for us the step-by-step process that must be followed from project start to finish – and some of these can become very complex.

The PMBOK® Guide uses the five Process Groups to illustrate the project lifecycle:

- **Initiating** – those processes performed to define a new project or a new phase of an existing project by obtaining authorisation to start the project or phase.
- **Planning** – those processes required to establish the scope of the project, refine the objectives, and define the course of action required to attain the objectives that the project was undertaken to achieve.
- **Executing** – those processes performed to complete the work defined in the project management plan to satisfy the project specifications.
- **Monitoring and Controlling** – those processes required to track, review and regulate the progress and performance of the project; identify any areas in which changes to the plan are required and initiate the corresponding changes.
- **Closing** – those processes performed to finalise all activities across all Process Groups to formally close the project or phase.



*Adapted from PMBOK® Guide 2013*

Note in this example how the process is not entirely linear – planning and executing are intertwined as the project activities are implemented. Also, from a best practice perspective, the monitoring and controlling process group can be applied throughout the duration of the project.

Starting with an identified business need and concluding with a specific business impact, all projects go through a series of defined stages which are applicable in any industry.

# Initiate

The idea for a project often originates from an organisation's strategic plan. However, projects may also be initiated by individuals or groups with an idea for improving work methods, customer experience or in response to external shifts in the marketplace.

The aim of this first stage of the project lifecycle is to define the project to determine whether the idea is worth pursuing. The key questions at this stage are:

Purpose	What will the project do?
Context	Why is this project needed?
Objectives	What will the project deliver?
Name	What will the project be called?
Stakeholders	Who is impacted by or has an interest in the project?
High level plan	Who? What? When? How? Where?

## Project Proposal or Business Case

Processes for initiating a project will differ from organisation to organisation. Many compile the key information into a 'project proposal' or business case. Similar to an individual using a resume to secure a job, the proposal paper is the mechanism by which a project secures funding and is able to progress towards planning.

Your proposal must at least cover the following:

- context: alignment to business plan, strategic plan
- value proposition: benefits (often contains a feasibility analysis) balanced with risks
- focus: the problem and the recommended solution
- deliverables: the objectives and the tangible outcomes of the project
- schedule: a simple breakdown of what will be required over time to achieve the objectives
- required resources: estimated budget, resources, project team requirements
- summary and recommendation.

As any project will require investment, it is essential at the proposal stage to identify the project's sponsor. This is the person (sometimes group) who provides resources and support for the project and is accountable for the project's ultimate success. The sponsor leads the initiation of the project and is involved in authorising changes to the project. Depending on the size of the project there may be multiple points at which the sponsor reviews project progress before approving the project's next stages.

## Case Study: Systems integration

Throughout this program you will work with your group to apply some of your learning to a fictional case study situation. Background to the case study and the project you will work on are detailed below. Not all conceivable information is provided and you and your group have full creative license to tackle the project however you like. Your facilitator will naturally provide guidance.



Your organisation is a specialist provider of residential and commercial furniture and interior design. You sell direct to the public but also have contracts with major organisations to fit out offices, retail malls, hotels and resorts. You even have lease arrangements for fitting out film and TV sets.

Your organisation has grown predominantly through acquisitions and most recently has bought a struggling home furnishings business called Furniture Easy. Despite less-than-impressive financial performance in recent years, Furniture Easy has a good reputation and a robust network of quality suppliers, in addition to solid distribution channels.

Furniture Easy will maintain its brand identity but will be fully integrated into your business. This integration will include systems, processes and operating practices. You are the project manager assigned to lead the integration and earlier today you visited Furniture Easy's main base of operations to determine what the project will involve.

During your visit you discovered the following:

- Despite being an online retailer, Furniture Easy has not upgraded its website to move with the times. The site is clunky and is notorious for failing during order transactions. When this happens it's estimated that 75% of affected customers simply give up and go elsewhere. The remaining 25% will call the company direct but even then this doesn't always result in a sale.
- The website in many respects is a façade – once an order is secured online, the actual order process is often completed manually using paper forms.
- The company's IT Operating System is something from the dark ages.
- All staff use ancient desktop computers that also look like relics from a different era.
- There are often disparities between the order process and the shipping process and when customers call for an order status, often one can't be given.
- Morale among staff is exceptionally low and having recovered from a round of redundancies last year, many suspect the acquisition will only lead to more.

You strongly suspect that other issues will emerge as you set about to plan the project. One thing is certain though – you have only three months to turn this business around.

## Project Objectives

The project's objectives drive the rest of the project planning process. What do you want to achieve?

A SMARTT objective must be:

- **Specific**  
Make it specific. What exactly do you want to achieve?
- **Measurable**  
Put a figure on it. How many? How much? How often? How big?
- **Achievable**  
Make sure that you and the team can do what you are aiming for.
- **Relevant**  
Is the objective relevant to the business, the department, the team?
- **Time-bound**  
When do you want to achieve this? Next week? This quarter? This financial year?
- **Trackable**  
Can you follow progress towards your objective?

## Business Fit

One of the most important considerations when determining your project's objective is to articulate how they fit with broader business goals and issues. While the project itself will have SMARTT objectives, you need to understand the project's impact in broader terms.

Imagine for example that an organisation initiates a project to reinvigorate its image in the marketplace by developing a new brand identity. The main project will be the brand development and launch however the impact (if the project is successful) will create an increased customer base and company revenues.

In this respect, a brand relaunch objective might be:

'To develop a brand image and messaging that attracts 15% market share of the male, 18-25 year old demographic in the [X] product category within six months.'

This in turn could be linked to an organisational goal such as:

'To increase [X] product category revenues by 10% year-on-year over the next three years.'

**Activity: Project objectives**

Brainstorm with your group possible objectives for the Furniture Easy integration project. Also consider possible goals of the parent company in undertaking this project.

Objective	S	M	A	R	T	T
Objective	S	M	A	R	T	T
Objective	S	M	A	R	T	T
Objective	S	M	A	R	T	T
Objective	S	M	A	R	T	T

## Project Stakeholders

### Identifying stakeholders

Stakeholders are persons, groups, or organisations that affect – or can be affected by – your project. This includes customers, managers, suppliers and other employees. They are the people who will judge the success or failure of the project. It is important to identify in advance who your stakeholders are and how the interdependencies will affect your team.

It's also important to consider the relative extent to which stakeholders are interested in or affected by your project. Take the example of a company brand relaunch. Although this project has objectives around attracting new market share, what about the existing market? How will they react to the change of brand identity? Will they embrace it or feel alienated by it? Could the project actually result in loss of business?

With these questions in mind, it's clear that existing customers and clients are important stakeholders to consult during this project.

### Managing stakeholders

Once you have identified the stakeholders, you need to determine exactly what the success of your project means for them. Because stakeholders' interests vary, their definitions are likely to differ. One of your critical tasks in this phase is to meld stakeholders' expectations into a coherent and manageable set of objectives.

Frequent interaction with your stakeholder groups ensures that all required information is available, and that goals, activities and performance criteria are aligned at all levels.

### Activity: Project stakeholders

Work with your group to determine the key stakeholders in the Furniture Easy integration project.

## Project Scope

After a thorough analysis of the project initiative you will be ready to scope out the project, i.e. apply the boundaries around the project that will ensure its success. The purpose of scoping is to outline what will be required to manage the project and ensure that it is approved by all of the relevant parties.

The project scope brings together information from stakeholders and ensures their expectations for the project are clarified and articulated (and any conflicts resolved) before the project work commences.

### Inclusions, Exclusions and Assumptions

We need to define the boundary of responsibility of the project by defining exactly what the project is designed to achieve. It provides everyone involved with a clear understanding of the inclusions, exclusions and assumptions.

Take the example of a brand relaunch. With this project we might determine the following:

- **Inclusion** – contracting of a creative agency to design the new brand according to project specifications.
- **Exclusion** – the new brand will be applied to new product lines only – existing products will carry the original brand until sold out.
- **Assumption** – once the brand has been relaunched there will be no further investment in or changes to the brand for a minimum five years.

### Activity: Project Scope

Work with your group to determine the scope of the Furniture Easy integration project.

Inclusions	Exclusions
Assumptions	

# Plan

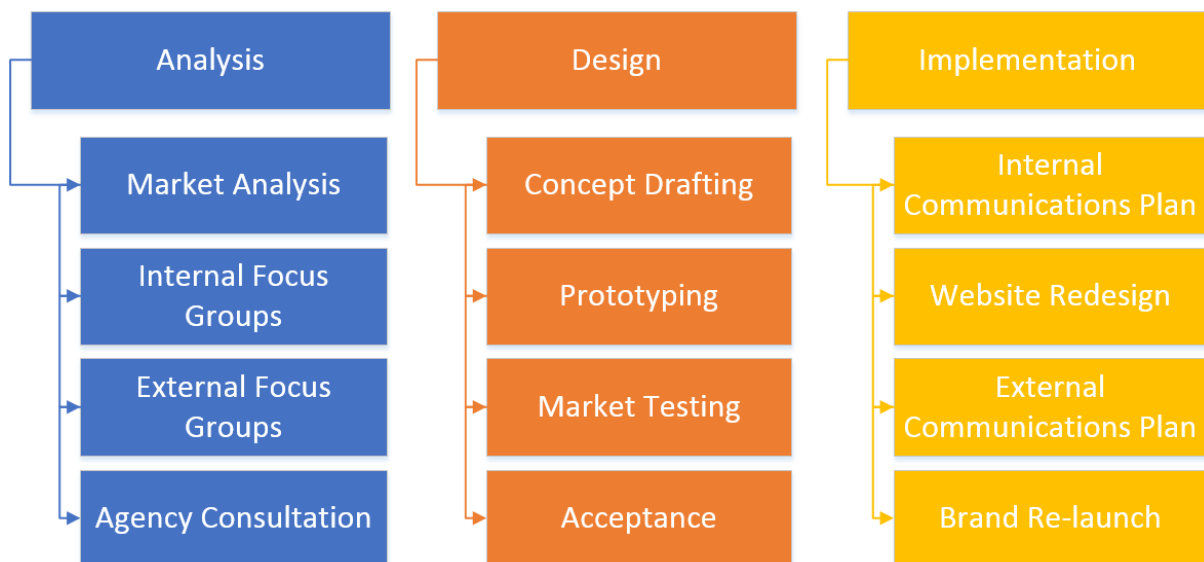
Now that you have developed the big picture during the initiation stage, the planning stage is where you create the detail.

Project planning clearly defines what the project is going to do, when, how long it will take and who will be involved. The aim is to establish an outline which can be used in the execution stage to coordinate the various interdependent tasks and ensure the objectives are achieved in a timely and effective manner.

## Work Breakdown Structure

The work breakdown structure (WBS) is a visual list of the tasks and sub-tasks necessary to complete the project. While the process of creating a work breakdown structure is relatively simple, it is a vital planning step. By defining the scope into manageable chunks, the project team can accurately determine the time and resources required and develop the project schedule. It also helps to ensure the team understands what work is expected of them.

Once the key tasks have been identified, you need to brainstorm the sub-tasks required to complete each key step. Once you have all the tasks, you need to sequence them – that is, put them in some logical order. A simplified WBS for the brand relaunch project might look something like this:





**Activity: Work breakdown structure**

Work with your group to brainstorm and record a work breakdown structure for the Furniture Easy integration project.



## Scheduling

For each of the tasks in a WBS, an estimate of time required to complete each task, along with starting and finish times will allow the development of a schedule. Estimating the time required to undertake each task can be difficult and, again, will require input from project team members and possibly others with some expert knowledge. In some cases, by assigning a time estimate, we are actually planning the amount of time being allocated to the task.

The tasks in the project may be dependent on each other. That is, one task may need to be completed before the next can begin. In this relationship, we can say that the second task is dependent on the first being finished.

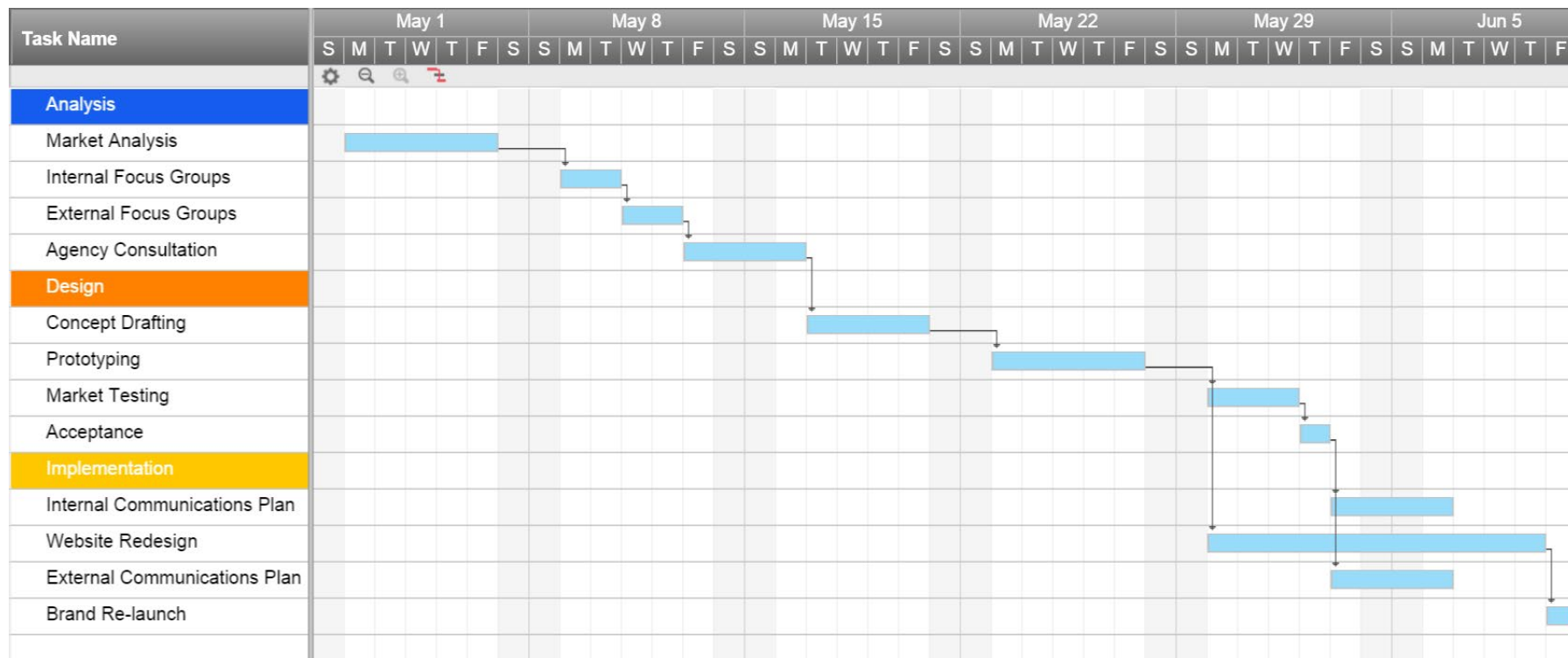
A simplified project schedule for the brand relaunch might look something like this.

Task Name	Duration	Start	Finish	Predecessors
<b>Analysis</b>	11d			
Market Analysis	5d	05/02/16	05/06/16	
Internal Focus Groups	2d	05/09/16	05/10/16	2
External Focus Groups	2d	05/11/16	05/12/16	3
Agency Consultation	2d	05/13/16	05/16/16	4
<b>Design</b>	13d			
Concept Drafting	4d	05/17/16	05/20/16	5
Prototyping	5d	05/23/16	05/27/16	7
Market Testing	3d	05/30/16	06/01/16	8
Acceptance	1d	06/02/16	06/02/16	9
<b>Implementation</b>	15d			
Internal Communications Plan	2d	06/03/16	06/06/16	10
Website Redesign	10d	06/03/16	06/16/16	10
External Communications Plan	2d	06/03/16	06/06/16	10
Brand Re-launch	1d	06/17/16	06/17/16	13

### Preparing a Gantt chart

A Gantt chart is a clear and unambiguous pictorial representation of the project plan. It illustrates tasks over time by using a horizontal time scale, a vertical list of activities, and a horizontal line or bar for each task. The length of the bar indicates the duration of each task or milestone. Different types of bars can be used to represent different tasks.

There are a number of applications you can use to help with scheduling. The following example for the brand relaunch project has been created using SmartSheet.



Check out these websites for more scheduling tools:

<https://www.projectplace.com/>

<https://www.smartsheet.com/>

<https://www.teamwork.com/>

<https://hubplanner.com/>

<http://www.clarizen.com/>

<http://gantter.com/>

**Activity: Scheduling**

Working with your group (and in a format of your choice), prepare a draft project schedule for the Furniture Easy integration project.

Use your WBS as your guide and determine the dependencies between your tasks and activities.

---

## Project Budget

Four components typically make up the project budget:

1. **Direct labour costs (DLC)**

Direct labour costs are the hourly, weekly or monthly wages of those working on the project. The DLC is determined by multiplying the appropriate rate by the amount of time each person is expected to work on the project.

2. **Other direct expenses**

These expenses are project-specific expenses not incurred by the organisation with any obvious regularity. For example, project travel expenses, purchase/hire of special equipment, purchase of special materials, consultant fees, report production.

3. **Overheads**

These include such items as office supplies, rent, electricity and telephone, and management expenses. In most organisations, overhead costs are usually fixed in relation to direct labour costs. These costs are 'indirect' and will be incurred by the organisation even if the project does not proceed.

4. **Fringe benefits**

Fringe benefits are the non-salary benefits derived by the employee, and may include items such as health insurance, profit sharing, life insurance and a company car.

Fringe benefits are also indirect costs, usually directly proportional to direct labour costs.

The budget may be developed 'top-down', that is a top budget limit is set and the project must be resourced within that figure.

For simple projects, budgeting can be reasonably straightforward. However, for complex projects with a significant procurement element, the work of identifying and estimating resource needs and costs is a specialist task.

## Project Resources

Behind the development of the project budget is the need to identify the resources required. The types of resources will vary depending on the type of project, but they usually include:

- human resources, including contractors
- equipment, machinery, tools
- materials
- services (electricity, communications etc.)
- facilities (premises)
- fees, charges, licences.

## Project Team Roles

In the same way that managers might find themselves juggling several projects simultaneously, chances are that some or all of the project team members are also involved in other work. What this means for the project manager is that they need to be aware of and address conflicting objectives and priorities.

While some projects will involve a dedicated team from start to finish, the more likely scenario is that team members will come and go as needed within the project schedule. Keeping track of who is doing what, when and why is essential.

It's also vital that contributing team members understand their specific roles, tasks and desired outcomes. While the project manager shouldn't aim to micro-manage, it is important to have regular dialogue with individuals and the team as a whole.

Also give consideration to your role as the project manager. In the same way that the project has boundaries, you also need to be clear on what you take on personally versus those activities to be undertaken by others. Depending on the type and scope of the project, should you be hands-on playing an instrument, or should you be more like the conductor of the orchestra?

### Discussion: Project team roles

Think about the Furniture Easy integration project. What roles will be needed to achieve the project's objectives, when and why?

## Project Risk

Analysing where things can go wrong is an important part of the planning process. It enables you to put in place actions to prevent the risk from occurring (mitigation) and to plan what action to take if a risk occurs (contingency).

Planning for the effective management of risks involves assessing the risk and planning control mechanisms to eliminate or reduce the impact of each risk.

Once you have identified the risks, the risk rating allocated will be based on an assessment of the likelihood of risk occurrence and its potential impact (consequence). For consistency across the organisation, ratings should be based on a matrix along the following lines.

	Consequence				
Likelihood	Insignificant	Minor	Moderate	Major	Severe
Almost certain	M	H	H	E	E
Likely	M	M	H	H	E
Possible	L	M	M	H	E
Unlikely	L	M	M	M	H
Rare	L	L	M	M	H

*Department of Prime Minister and Cabinet*

## Risk Treatment

Risk treatments are normally classified against the following possibilities (or a combination thereof):

<b>Avoid</b>	Review and replan the project to avoid the risk.
<b>Mitigate/Reduce</b>	Action can be taken to reduce the likelihood or potential consequence of a risk occurring.
<b>Transfer/Share</b>	Transferring or sharing a risk means another party is willing to accept some of the consequence. For example, buying insurance or contracting out services / liabilities.
<b>Accept</b>	Means that although the risk is identified and acknowledged, the project will proceed without making any changes.

**Activity: Project risk**

Working with your group, review your project plan and determine possible risks to the Furniture Easy integration project. For each risk, rate the likelihood and consequence and determine the risk treatment approach to be adopted and a contingency plan where possible.

#	Risk Description	Likelihood (1 - 5)	Consequence (1 - 5)	Treatment	Contingency
1					
2					
3					
4					
5					
6					



# Execute and Monitor

Executing refers to putting into action the processes needed to complete the work in the project plan. This is the time where you implement all of the plans, schedules, procedures and processes that were prepared and anticipated during prior phases. Generally the longest phase of the project, executing involves coordinating people and resources to ensure tasks are completed according to objectives.

## Project Monitoring

Monitoring is the process of observing the execution of the project so that progress can be managed and potential problems can be identified and corrected when necessary.

It is important to take a proactive approach to monitoring so that changes and variances are detected early, enabling you to take optimal action. Review status indicators frequently and seek regular feedback from your team and from key stakeholders.

### Activity: Project monitoring

Work with your group to consider how you would monitor execution of the Furniture Easy integration project. What will you monitor, how and when?




Monitoring aspect	Methods	Frequency

## Project Performance Reporting

Records, information and data generated by projects can be contained in regular project performance reports, which are a required form of communication between stakeholders. Reports can be within defined formats or generated by team members depending on the needs of the project. Examples include:

- timely status reports on progress
- traffic light reports [a status report that highlights issues based on green (OK), yellow (potential/emerging problem) or red (urgent)]
- risks and/or issues register
- change requests/control report
- contract status reports
- regular budget reports.

In some projects, all these items are condensed into an overall regular project update report and different levels of information are provided for different stakeholder groups. Here's an example of a simplified status report for the brand relaunch project:

<b>Project Status Report</b>		
<b>Project Code:</b> 00345/A		
<b>Project Manager:</b> Marcus Wainwright		
<b>Report Date:</b> 9 June		
<b>Attention:</b> Sacha Delmar		
<b>Copy to:</b> Janine Buchanan, Daniel Markham, Dion Le-Maurier		
Item	Comments	Status
Internal Focus Groups (round 2)	Yesterday we held the scheduled internal focus group to discuss the shortlisted brand concepts with employees. Resistance was much more aggressive than anticipated and will require a rethink on how we handle the internal communications plan. Assumptions that staff would readily get behind the campaign were clearly wrong and greater sensitivity will be needed for the internal launch.	
Prototyping	The creative agency was scheduled to commence prototyping next Monday. They have reported some unexpected issues that will delay start by three days but are confident of meeting the agreed deadline. The situation will need close monitoring.	
Market Testing	Preview events held last week in metro hubs created a lot of excitement. Feedback through Twitter and Facebook has been overwhelmingly positive.	

## Managing Variations

At times the project may face external changes or unplanned events which prompt significant changes to the project. It is important to actively manage these variations to ensure the project is able to deliver the required outcomes.

It is critically important to keep the project on track. Unanticipated events and situations will inevitably be encountered and some scheduling may need to be altered.

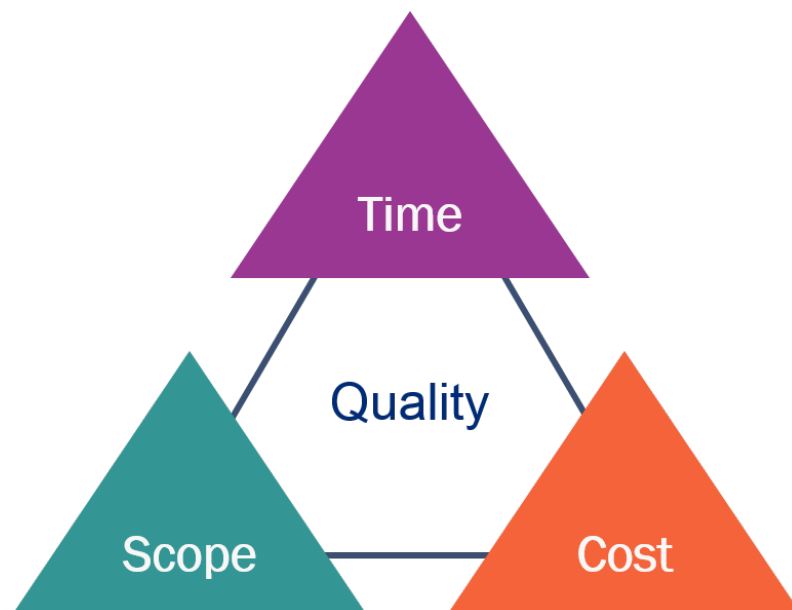
Evaluate the impact across all factors of the project including:

<b>Risk</b>	Will the variation increase the project risks?
<b>Quality</b>	Will the variation impact the quality of the project?
<b>Estimates</b>	How will the variation affect existing estimations?
<b>Schedule</b>	What impact will the variation have on the schedule?
<b>Outcomes</b>	What impact will the variation have on the project deliverables?
<b>Benefits</b>	Will the variation impact the benefits of the project outcomes?
<b>Costs</b>	How will this affect costs?

Where necessary, seek confirmation (approval) that the variation should result in a permanent change to the project. Communicate the findings of the evaluation process to the critical and essential stakeholders to determine whether the change should go ahead. If so, adjust the plans and execute accordingly.

### The Triangle of Triple Constraints

The 'Triangle of Triple Constraints' refers to the nature of all projects. You cannot change the budget, schedule or scope of the project without affecting the other two parts. Quality is a constant in projects and is defined within the project. By adjusting the three constraints you will change the project quality.



**Activity: The triangle of triple constraints**

Working in your group discuss and record in the table the potential consequences (positive and/or negative) that could occur as a result of changes to the triple constraints.

Adjustment	Consequence(s)
Cost increase	
Cost decrease	
Timeframe increase	
Timeframe decrease	
Scope increase	
Scope decrease	

# Close

Project review and closure is the final process for the project and is used by senior management to assess the success of the project, inform future projects, 'tidy up' any loose ends and formally close the project. This is the stage at which you check that:

- you have done everything that has been planned
- the client is satisfied with the deliverables
- project objectives have been achieved
- lessons have been captured for your organisation.

This is the opportunity to celebrate success and reward performance, as well as being the opportunity to review what went well and what needs improvement. You also need to finalise recording and documenting all aspects of the project.

It is important to get the client to sign off on the project – not only to say they are satisfied with the result but that they agree the project is completed. This is also a time to manage the breakup of the project team and their return to their normal work functions.

## Activity: Project close

Consider the following aspects of a project. What will you need to do in regards to each to close the project?

Project aspect	What do you need to do?
Project team	
Stakeholders	
Legal	

Contractors	
Suppliers	
Equipment	
Project deliverables	

## Final report

Every project should be closed with a final report which may include a presentation to the main stakeholders. This report can contain many different aspects but will normally cover:

- formal completion
- outcomes and deliverables
- financial report
- termination of contracts
- lessons learned
- document archiving.

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## Project Evaluation and Lessons Learned

The final step in finishing your project involves conducting a comprehensive review to assess the project so that you can determine what went well along with what could have been done better. From this review you can develop a lessons learnt report that will help others when formulating new projects. Importantly, you need to find ways of making your lessons available to the wider organisational community.

This is important as many seemingly unrelated projects can face the same challenges and encounter the same failures – by learning from your own and others' project experiences, you can hope to achieve more consistently positive project outcomes for the future.

Here are just some of the questions you need to ask when evaluating your projects:

- Planning – how well was the project planned? Was the scope planning effective?
- Were risks adequately identified? Were contingency plans effective?
- Organising – did the overall project come together well?
- Executing – were there schedule delays and if so, why?
- Directing – how well did the project manager direct the project?
- Controlling – how well did success metrics perform and did they meet expectations?
- Budget – did the project stay within budget?
- Were quality requirements met?
- Were project communications effective, reliable and valid?
- Did the project team work well together?
- Were there unresolved conflicts?
- Were all external compliance requirements met?
- What feedback was received on the project (positive and negative aspects)?

### Discussion: Project evaluation and lessons learned

What mechanisms do you or could you put in place to ensure that knowledge and experience gained through projects is shared throughout your organisation?

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# Learning Journal

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Take this opportunity to reflect on what you have learned in this workshop, and consider the changes you can make to ensure that you continue to apply the knowledge and skills you have gained.

**What do you want to...**

Start	Stop
Change	Continue



# Assessment Task Summary

A summary of the assessment tasks follow here, but please refer to the full Assessment Kit (provided in MSWord format via your online resources) before commencing work.

AIM recommends that assessment for this program be completed within six weeks of undertaking training. If you anticipate needing more time, please inform Student Services so that your records can be updated accordingly.

<b>BSBPMG522 Undertake project work</b>	
<b>Knowledge Questions</b>	
1.	Describe the four phases of the project lifecycle and who gets involved from your organisation in each phase of the project.
2.	Explain how project approval is executed in your organisation. Describe the typical project stakeholders and sponsors in your organisation.
3.	Discuss the impact of your organisation's mission, goals, objectives and strategic plans have on the planning and management of projects you have been involved with.
4.	Explain why it is necessary for a project to have each of the following attributes: <ul style="list-style-type: none"> <li>• Objective</li> <li>• Sponsor</li> <li>• Schedule</li> <li>• Deliverables</li> </ul>
5.	What are some important considerations to be aware of when forming a project team?
6.	What legislation do you need to consider when managing projects in your organisation? Comment on the place of this legislation in your planning and implementation of projects.
7.	What steps are necessary to finalise a project? Why is finalisation important?
<b>Workplace Tasks</b>	
<b>Task 1</b>	
a.	Select a specific project that will add value to your business unit
b.	Identify and bring together a project team to work on the project.
c.	Develop a project scope which identifies: <ul style="list-style-type: none"> <li>• Deliverables</li> <li>• Resources required</li> <li>• Project Stakeholders</li> <li>• Relationship to other projects</li> </ul>

- d. Develop a project plan outlining
  - Project Timeline
  - Project responsibilities
  - Project budget
  - Risk management
- e. Implement the project acting in the role of project manager. Ensure that you maintain regular and effective communication with team members and key stakeholders.
- f. Complete a final report at the conclusion of the project which reviews:
  - Actual deliverables against planned
  - Project Team effectiveness
  - Re-assignment of project team members
  - Lessons learnt.
- g. Document all of the above.



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