Systematic Planning and Evaluating the Project Management Effort

Morten Fangel, Chief Consultant
fangel Consultants
morten@fangel.dk

Introduction

When managing projects the focus is on how to *perform* project management activities as well as project execution activities. The *planning* and *evaluating* of the project management effort itself is primarily done intuitively based on years of experience - or by following pre-determined guidelines for project management.

However, a more *conscious* and *systematic* planning and evaluating of the management effort is needed for several reasons, which are listed in the paper. Further, the paper presents a methodology of which the three main steps are:

- *Exploring* the project situation and characteristics as well as the project management challenges and potential initiatives.

- *Extracting* master and detail plans for the project management effort.

- *Evaluating* the performed project management activities including documenting each activities in a logbook.

Later, we transfer our experiences from implementing the concept in practice - and in in-house project management guidelines as well in the baseline for assessing project management competences.

The methodology has been developed and refined over the last ten years - based on our research, consultancy, and practising of project management (Fangel 1989) (Fangel 2000).

An Example of Planning PM Effort

Let us start with an example on conscious dealing with management effort in a project:

John has just been appointed project manager of a new project. He had expected his new project to be postponed until his present project had come closer to a completion, but unfortunately it did not turn out that way. "It is a really exiting project", and "you are just the man for the task" as the project owner said at the just terminated meeting.

Later that day, at lunch, John runs across Helen who participates in his current project. "Congratulation with your new job - I just saw on the Web-page that you were the lucky guy. How do you intend an approach to this new project?" "How"? John looks speculative and says, "I have not had time to consider it in details".

While Helen goes on telling about her new holiday plans John is considering why she asked. His next thoughts go back to the start of their common project into which he also rushed headlong. It really took a considerable amount of time before he succeeded in activating the

other participants in the project. During the first months he had almost made all the work alone - anyhow, that was how he had felt it.

Now John looks very determined. "This project should be different", he thought, " I must do more to activate the participants - but how? Everyone is very busy?" John decides to send e-mails explaining how the new project should be dealt with. When he has discussed the contents with the project owner he will send e-mails to the future participants.

*But what should be included in the plan for his project management - he chooses to play back to Helen. "It sounds as if you are going to have a really exciting holiday. I wish I could do the same. But I wonder if you could spend some time with me discussing my new project before you leave. It seems as if you have some ideas - in any case, I would like to have your view on my plans for getting a better start for the new project. I think you know how I **am** thinking". Helen smiles and promises to pass by in the afternoon.*

John was inspired to start on what is called *planning the management effort* of a project - or in brief *PM planning.* Other expressions are "planning the planning" or "managing the management".

Three Levels of Managing Projects

To use the project approach implies also to spend time and effort on the management of the project. To visualise the management effort in a project model we distinguish typically between the two levels, project execution and project management.

Project execution implies to solve and implement the project task - the project management establishes suitable conditions for the entire project and for the project execution. In practice, managing and executing activities will be united. The same meeting may both contribute to tackle the project task and deal with management activity such as the rules of game for the further co-operation. But it is still useful to distinguish between execution and management.

When focusing on how to plan and evaluate the management effort a third level of the project model is introduced - it reflects a conscious approach to the execution of project management.

A project-oriented company will typically have guidelines for the handling of projects. The guidelines can apply to one or several of the three levels of the model:

1. The classic project model gives guidelines directly for *project execution processes.* Detailed project models per project type give solutions, for example, for project break-down structure, major milestones, way of organisation, distribution of tasks, structure of documents, execution methods, etc. This type of guidelines promotes a transfer of experiences from one project to the next one and spares the project management for inventing the needed elements in its own project plan. Further, the method fulfils the wish for a common terminology.
2. Another type of guidelines is directed against the *project management processes. The* point of view can be that the company's projects are too different for using detailed project execution models. Anyhow, we want to professionalise some management processes - for example the project start-up - and/or some management activities -for example the project planning. Guidelines - if possible combined with patterns - are prepared for the selected elements of project management. Every aspect can be included in a project management model - i.e. a model for the entire management effort in projects from the conception till the result is presented.

3. A third possibility is guidelines for *planning and evaluating the management effort* itself. The point of view can be that neither a project model nor a project management model is suited - because both the projects and the participants are different. But project management is necessary, therefore guidelines are offered as a lever for choosing how to execute management in the best way. This approach is the topic of the present article.

In practice, you do not have the choice of *either one* type of guidelines or another. The company's project guidelines will be a combination - but the argument of this article is that the focus of the guidelines should be shifted *from* project models *over* project management models *towards* methods for planning and evaluating the management. (Jensen + Fangel 2002**)**
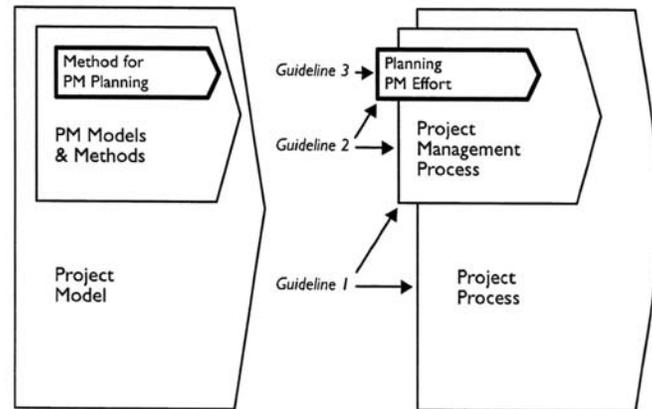

Exhibit 1

The Need for Planning and Evaluating PM effort

An experienced project owner or project manager might think that this is irrelevant. The core of being a professional project manager is precisely that you instinctively know the amount of managerial effort to be used in a specific project situation. Add to this that we, by and large, always work with a time pressure in all major projects - so how to overcome to "plan the planning"?

In the area of competence development we distinguish between four levels: unconscious incompetence; conscious incompetence; conscious competence; and unconscious competence. If you have reached a four-level competence on management of projects it might be felt as a constraint to have to fit own intuition into a method. Anyhow, the advice is to try to consciously plan project management not as an alternative, but as a support for the development of intuition and solid judgement.

There are several reasons for investing more efforts in a conscious planning of the management effort in projects:

 • Project management is utilised for *broader variances of tasks,* which implies that experience and guidelines from one situation should not automatically be transferred **to** another situation.

 • Clients are *requesting documentation* and *quality assurance,* also of project management activities.

 • Documented management planning makes it easier to *involve* both the project owner and the project participants in the management effort.

- Conscious planning and evaluating of the effort is a powerful vehicle for *learning and transfer* of project management knowledge.

- Finally, a well-documented project management process is at great help in case where the project management function *has to be transferred* to a new project manager.

Planning the management effort should take place especially at the start of the intensive periods of the project management effort -typically the project preparation, the project startup, the project evaluation, and the project close down. Of cause, it is also relevant during the project co-ordination to make a conscious planning and evaluation of the management effort.

Methods for Planning Project Management Effort

The essence of planning the project management effort is to realise the *managerial problem* or challenge during the period in question.

In the example John has presumably a clear notion of this challenge - to activate the participants earlier than last time. But who can say that John has realised all the challenges - let's hope that Helen will make him consider other managerial challenges when they meet.

When the challenges are clarified a simple method is to initiate a brainstorm on any possible management initiatives, for example to visualise the project's common aims and to arrange a project start-up meeting.

A more systematic method is to divide the planning and evaluating into nine steps:

Exploration
- The project and its stage   *Where*
- Characteristics of the project   *Why*
- Challenges of the project management *What*
- Initiatives to cope with the challenges *How*

Extracting
- Activities of project management   *What & When*
- Project management roles   *Who*
- Project management methods / forms *How*

Evaluating
- Documentation of performed activities *What & When*
- Documentation of performed management roles *Who*
- Evaluation of the PM performance *How*

In the following sections questions and examples for each of the steps will be further elaborated.

In the example with John and Helen the method's first four steps can be utilised as a simplified agenda for their debate. Not to say that they should accomplish the items step by step without reflection - but rather use them as a rack for their debate and as inspiration for letting considerations develop from lower to higher figures and to a minor degree the other way round:

- *John has just been appointed project manager.*
- *Other things might be added, but let us stick to this piece of information to simplify the example.*
- *John's immediate reaction is "I must immediately study the new project (the challenge)*
- *By examining the present project description (the activity) with the project owner (distribution of roles) "Yes, think I will sit on his knee (the method/form).*

Based on this creative talk at the meeting with Helen it is recommended that John prepare an activity plan as a diagram - covering the steps 4, 5, and 6. The further implementation of the method is that John registers and estimates the actual management activities - for example in the same document as the activity plan.

The advantage of using this method with the nine steps is that it keeps focus on the planning and evaluating of the management - and prevents that the focus is turned towards solving the management tasks, yes even to accomplish project tasks. Further, the steps can promote creativity and innovation - assuming that the participants are familiar with the method or the way of thinking. The disadvantage or the challenge is that the method can become a straitjacket if the interpretation of the steps takes all the attention.

The example with Helen and John seems to be easy and straightforward. But experiences show that an extra effort is necessary both to keep the planning of the management effort on the agenda and to keep focus on the topic until an effect has been achieved - far beyond a spontaneous attitude to the project management during the period in question.

Three types *of means* have proved their abilities to promote both the conscious planning and the evaluation of project management:

- **Dedicated PM Planning Meetings**
  Some planning meetings to be dedicated the evaluation of the ongoing project management and the planning of the project management for the next period. Step **0**, 1, 2, and 3 is an appropriate agenda for such a meeting.

- **Documented PM Effort**
  Four types of documents can promote both planning and evaluating of the management effort:
  - Initial exploration is documented under the title *Exploring plan for project management*
  - Exploration is concluded in an *Overall plan for project management to* promote focus on the most important aspects and can be arranged according to the first four steps of the method.
  - *Activity plan for the project management* converting the overall plan into detail plans including deadlines, distribution of tasks, and method proposals - according to steps 4,5, and 6.
  - *Project management logbook* in which the performed management activities **are** documented and evaluated according to steps 7, 8, and 9.

- **Sparring to Promote Creativity**
  - A perfect solution is that the *project owner/sponsor* acts as a sparring partner for the project manager concerning the management of the project.

- Another possibility is to use *colleagues* for sparring, either ad hoc, as *it was the case with Helen and John,* or in a more formalised network.
- A third possibility is to hire an internal or external *consultant.*

Typically, a planning meeting is held at the beginning of the phases/periods that imply important management effort - such as the project preparation, the project start-up, the project evaluations, and the project close down. Natural participants are the project owner/sponsor, the project manager, and other key persons. *The meeting between Helen and John could be considered as a planning meeting.*

The following sections specify each step of the conscious planning and evaluating of the project management.
The plan should be elaborated for a specific period of the project - if the plan is extended to cover the whole project the contents might be too general and will not promote a suitable management effort.

Exploring the Plan for Project Management

Planning the project management should be initiated by a *capturing of information* by a brainstorm, which utilises the participants' intuition and experiences and gives them **an** opportunity to unfold their creativity. The following scheme can be used for such a preparation of a PM planning for a coming period - typically one to two months.

- **The Project and its Stage**
   Project definition and stage. Explain for example the project aim, process, and/or organisation.
   Could be supplemented by a review of the logbook for project management from the previous period, see steps 7, 8 and 9.

- **Characteristics of the Project**
   Describe conditions, which are determining the management effort in the project.
   Examples are scope, complexity, environment, cross organisation, etc.

- **Challenges of Project Management**
   The managerial challenges or problems. How can the project manager contribute to the project?
   For example to achieve a common view or a more positive climate.

- **Initiatives for Coping with Challenges**
   Management initiatives that contribute to the coping with challenges. Both proposals for management activities, such as analyses, planning, communication, and follow-up, proposals for management roles, and proposals for methods and types of meetings.

The aim of this detailed procedure is to involve the experiences from all participants in the process and to promote innovative thinking. The exploration can of course also take place as a more open debate.

Overall Plan for Project Management

An overall plan for the project management is established after the creative exploration - structured according to the method's steps 0,1,2, and 3. The task is to extract the essence - not to make a complete documentation of the exploration, which might have been made earlier in a separate "interim paper".

As to the overall project management plan we recommend the following:

- Define the scope to only one page - because it is difficult to stick to the plan's intentions during a stressed normal day

• List the contents as items - typically 3 - 5 items per step in the method - and

• Focus on the most "unnatural" management effort - and refrain from describing the part of management that takes place irrespectively of being listed in the plan.

Please note that such an *overall plan for project management* both in structure and contents **is** similar to an invitation to a project start-up workshop, for example:

• *The project and its stage.* A brief introduction to the project and a description of the direct cause for having the workshop now.

• *Characteristics of the project.* Conditions in and about the project indicating that a workshop is a relevant initiative.

• *Challenges of project management.* The aims of the workshop and the expected effect.

• *Initiatives for coping with challenges.* The main programme for the workshop including type of analysis, planning, and co-operation development. Further should be stated who might prepare presentations, and whether items in the programme are purely informative or require a broad involvement. Also information about facilities and tools for the entire workshop.

A refinement of the planning method includes supplying each of the steps with a checklist. Experience shows that such tools are most applicable for structuring and after-checking the results from a more open debate. Further, the checklists are useful for the editing of the results from the exploration. If the checklists are used as a starting point the output may be too extensive to apply in the practical overall plans for the project management.

Activity Plan for Project Management

The aim for the overall plan is to create an overview and to hold on to the important matters **as** to the interaction on the management effort during the period in question.

Further, a more operational plan for the management effort is necessary. In small projects the plan for the managerial activities can be linked with the detail plan for the project execution.

To hold focus on the management of the project we recommend elaborating a separate plan or a "list of action" in important projects.

A very simple plan is to list activity terms, periods, task distribution, and practical memories.

• **Project Management Activities**
How to transform the initiatives over specific management activities chronologically arranged in a list and assembled on relevant arrangements?

• **Role Distribution per Activity**
Who is responsible or who contributes to these management activities?
What is the role of the project manager in the specific activity?
Should the project owners and / or the project participants be involved in the planning?
How many hours / resources could be implied?
• **Means / Methods for the Activities**
How could the chosen management activities practically be conducted? Which methods / tools, examples or practical hints?

Another form for a detail plan is - for example - the detail programme for a project start-up workshop.

Logbook for Project Management

To promote a conscious follow-up and evaluation of the project management effort we recommend in important projects and/or during challenging project periods to generate a separate logbook for the management of the project. The best is not to mix it up with a logbook for the entire project.

The aim is:
- to become more conscious about the project management roles,
- to plan additional management initiatives, and
- to achieve more learning as to project management.

The best way for achieving this aim is to keep the logbook continuously - you will soon forget the things "that kept you awaken at a certain stage" and also the considerations that crossed your mind at that stage.

It might also be useful to *reconstruct a* logbook - based on minutes, dates on important documents etc.

The logbook could include five columns

- Naming performed **activities of project management** including meetings and other events.
  Short description of the activity / **event.**
  Timing of the activity / event

- Documentation of performed **management roles per activity**
  - and perhaps the amount of hours spend per activity / event.

- **Evaluation of performed management** - by stating both the plusses and deltas (minuses). Further, you should note proposals for supplementary management effort, considerations as to own effort as project manager, etc.

Implementing Planning and Evaluation of PM Effort

As project management consultants and when acting as coach for project managers we have applied the described methods in our own projects. This has on the one side indicated how systematic planning and evaluating can intensify the project management effort.

On the other side our applications in though practice confirm how easy you as a project manager forget all about *planning and evaluating* the PM effort including your own performance - and concentrate on *performing PM activities* and events or even project execution activities.

To promote the PM planning and evaluation, we recommend you to include this topic in the guidelines for project management in your cooperation. Yes, even to re-write your guidelines, so you give more focus on demands for planning and evaluation PM effort and less demands on utilising specific models and methods. Initially, the project managers may consider this to be more demanding, but the essence is that it will delegate more freedom to the project managers in selecting what they consider to be the best way of performing project management in their projects. Buy doing so you are implementing an "engine" for further development of your project management professionalism. As an example we have assisted the Air Material Command of the Royal Danish Air Force to develop guidelines according to this principle (Jensen + Fangel 2002).

Another application of the focus on level 3 in a project model - see the first figure - is the development in Denmark and Sweden of a new *National Competence Baseline* based on the *International Competence Baseline* issued by IPMA, the International Project Management

Association. In this so-called NCB we have decided to include *planning project management* to be a major area of project management competences. The main argument for adding this element to the competence standard is that the capability of *reflecting* on your project management and being *creative* in selecting your project management approach is one of the major differences between being a project manager and being a senior project manager! (Fangel 2005).
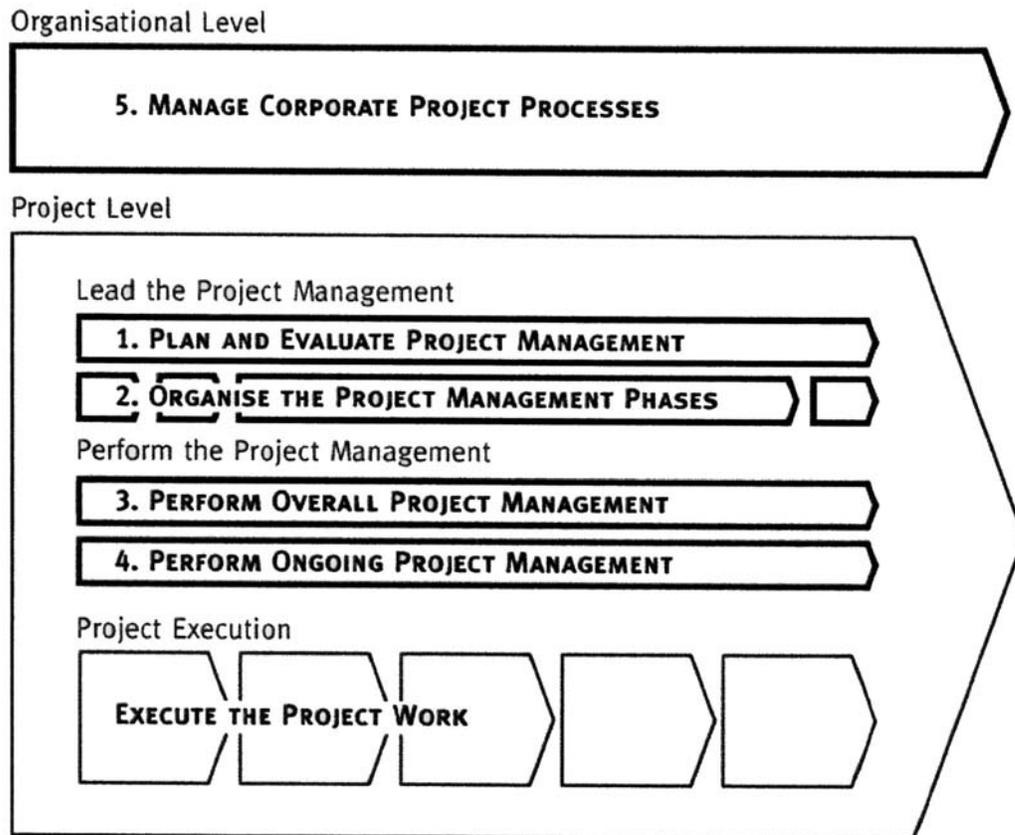

Exhibit 2

References

Fangel, Morten. 1989. What is Qualified Project Management? Proceedings of NORDNET Symposium on Quality and Project Management. Finland August 17-19 1989.

Fangel, Morten. 2000.
Methods for Planning the Management Efforts in the Project. Proceedings of the IPMA 2000 World Congress on Project Management. London May 22-25 2000.

Jensen, Palle Buus & Fangel, Morten. 2002.
Improving Project Management - by Broad Improvement in the Change Process. Proceedings of the Project Management Institute Annual Symposium. October 7-9 2002.

Fangel, Morten, Editor, 2005.
Project Management Competences

The mentioned articles by Morten Fangel are available on morten@fangel.dk