

Consultancy Project

Recap: PID format

Introduction to Change in Organisations



Today's Objectives



1. To recap PID structure/format
2. To prepare draft PIDs and E3 ethics form by 16 March
3. To assess the importance of change in organisational consultancy

Project's key stages

- Bid for work
- Ethical approval (Form E3)
- PID agreed (and signed)
- Feedback
- Plan research methods in detail
- Undertake research
- Analyse findings
- Brainstorm with client
- Present findings and informed ideas
- Report
- Action!
- Feedback/analysis
- Does the project achieve the PID goals?

Purpose of the PID

The PID is required to define the project. It answers the questions:

- **What?**
- **Why?**
- **Who?**
- **How?**
- **When?**

Aim & objectives of the PID?

- Identify stakeholders & interested parties
- Justify expenditure
- Ensure strategic planning
- Identify financing
- Properly define the project with measurable business benefits

PID Template

Key components /elements of the PID :

1. justification for the project
2. approach/es to be adopted
3. realistic business case
4. information about the project management team
5. quality management strategy
6. communication strategy
7. project plan
8. project control mechanisms
9. project reporting systems & procedures
10. any additional information

PID Template

1. PROJECT JUSTIFICATION – necessary to:

- a. provide a definition of the project
- b. explain what the project needs to achieve including:
 - ✓ Background
 - ✓ Project objectives & desired outcomes
 - ✓ Project scope & exclusions
 - ✓ Constraints & assumptions
 - ✓ The user(s) & other known interested parties
 - ✓ Interfaces i.e. links to other organisations, projects or reports

PID Template

2. PROJECT APPROACH – necessary to:

- define the choice of solution that will be used in the project to deliver the business option selected from the Business Case
- take into consideration the operational environment into which the solution must fit

3. BUSINESS CASE – should:

- describe the justification for the project based on estimated costs, risks and benefits

PID Template

4. PROJECT MANAGEMENT TEAM STRUCTURE –provide details of those involved e.g. via:

- A chart showing who will be involved with the project
- Role descriptions for the project management team and any other key resources

PID Template

5. QUALITY MANAGEMENT STRATEGY – should:

- Describe the quality techniques & standards to be applied & the responsibilities for achieving the required quality levels
- Define the quality expectations the project must achieve
- How they will be met
- Quality processes
- Risks & Risk Management Strategy

PID Template

6. COMMUNICATION MANAGEMENT STRATEGY – needs to:

- define the parties interested in the project & the means & frequency of communication between them & the consultant
- provide a schedule of activities & resource requirements for the entire project

7. PROJECT PLAN – should include:

- a summary of the plan
- scheduled key dates, activities, milestones, resource requirements, control points
- A time management plan

PID Template

8. PROJECT CONTROLS – identification/summary of:

- the project-level controls such as stage boundaries, agreed tolerances, monitoring and reporting

9. PROJECT REPORTING – may include:

- a schedule of Project Board meetings explaining purpose of each meeting & decisions required from the Board
- evidence of Report recipients, frequency, content & method of communication e.g. highlighted minutes, log of e-mails etc
- Checkpoint Report source, recipients, frequency content and method of communication.
- any other relevant project management communications
- if appropriate, an indication of the likely timing of any project updates and reviews

10. ADDITIONAL SUPPORTING INFORMATION IF RELEVANT

PID Review Checklist

- What the project is aiming to achieve ?
- Why it is important to achieve it ?
- Who will be involved in managing the process & what are their responsibilities ?
- How & when the project will be undertaken?

Preparing the proposal: an alternative structure

- Proposals propose how the consultant will perform the work the client desires (Stroh & Johnson, 2006)
- Typical headings within a formal proposal may be:
 1. Introduction,
 2. Objectives and scope
 3. Methodology
 4. Timetable
 5. Staffing
 6. Costings
 7. Annexes

E3 Ethics Form

On moodle

Append to
PID Submission





A Definition of Organisational Change

A process in which an organisation shifts from being in one state to being in another state

(Ford and Ford 1995)

Activity: What triggers change?

External factors:

- Economic trading conditions, home and abroad
- New technology
- Changed customer tastes/needs
- Competitor activity
- Mergers/acquisitions
- Legislation/govt policy
- Changes in local, national and world politics
- Changes in social and cultural values

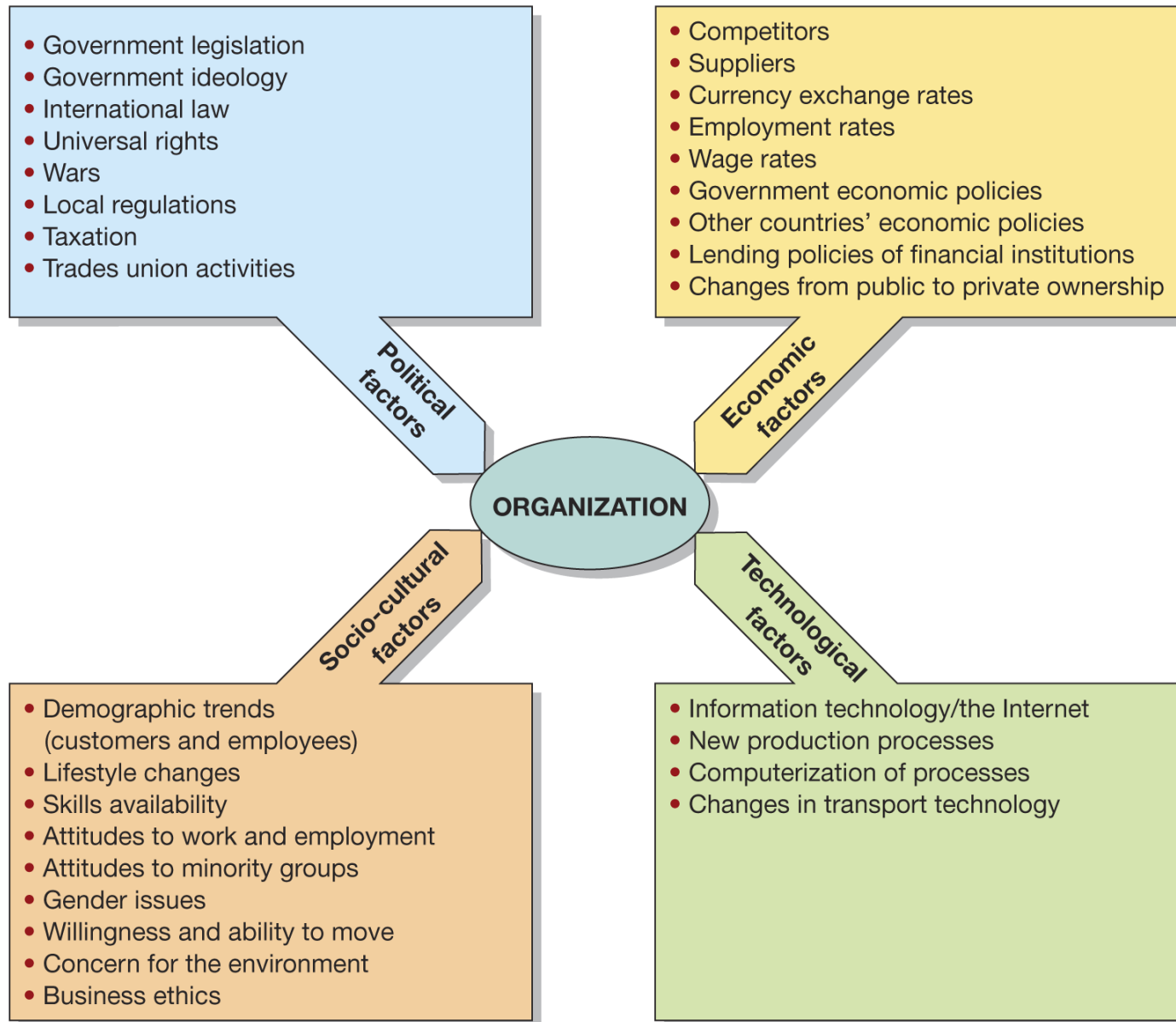
What triggers change?

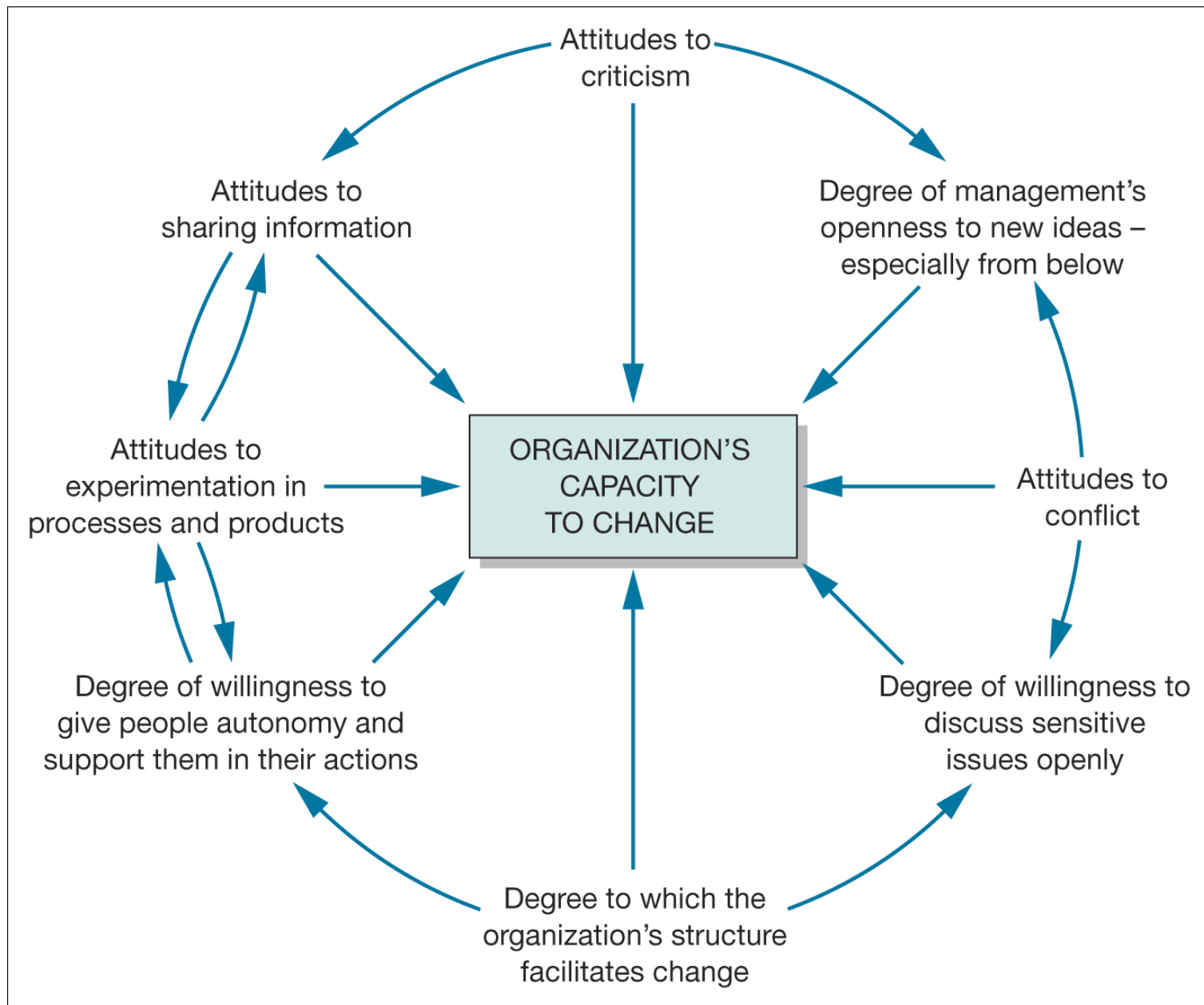
Internal factors:

- new products/services
- Poor performance
- Poor morale/ stress/staff turnover
- New boss/team
- Lack of skills
- Relocation
- Revised responsibilities
- Innovations in processes
- New ideas about customer service

The nature of organisational change

- Change is a pervasive influence. It is an inescapable part of both social and organisational life.
- Organisational change can be:
 - Reactive or proactive
 - Deliberately initiated by management
 - Evolve slowly over time
 - Imposed by changes in policy
 - Result from environmental pressures





Planned organisational change

- Underlying objectives of organisational change programmes can be seen as:
 - Modifying the behavioural patterns of members of the organisation
 - Improving the ability of the organisation to cope with changes in its environment

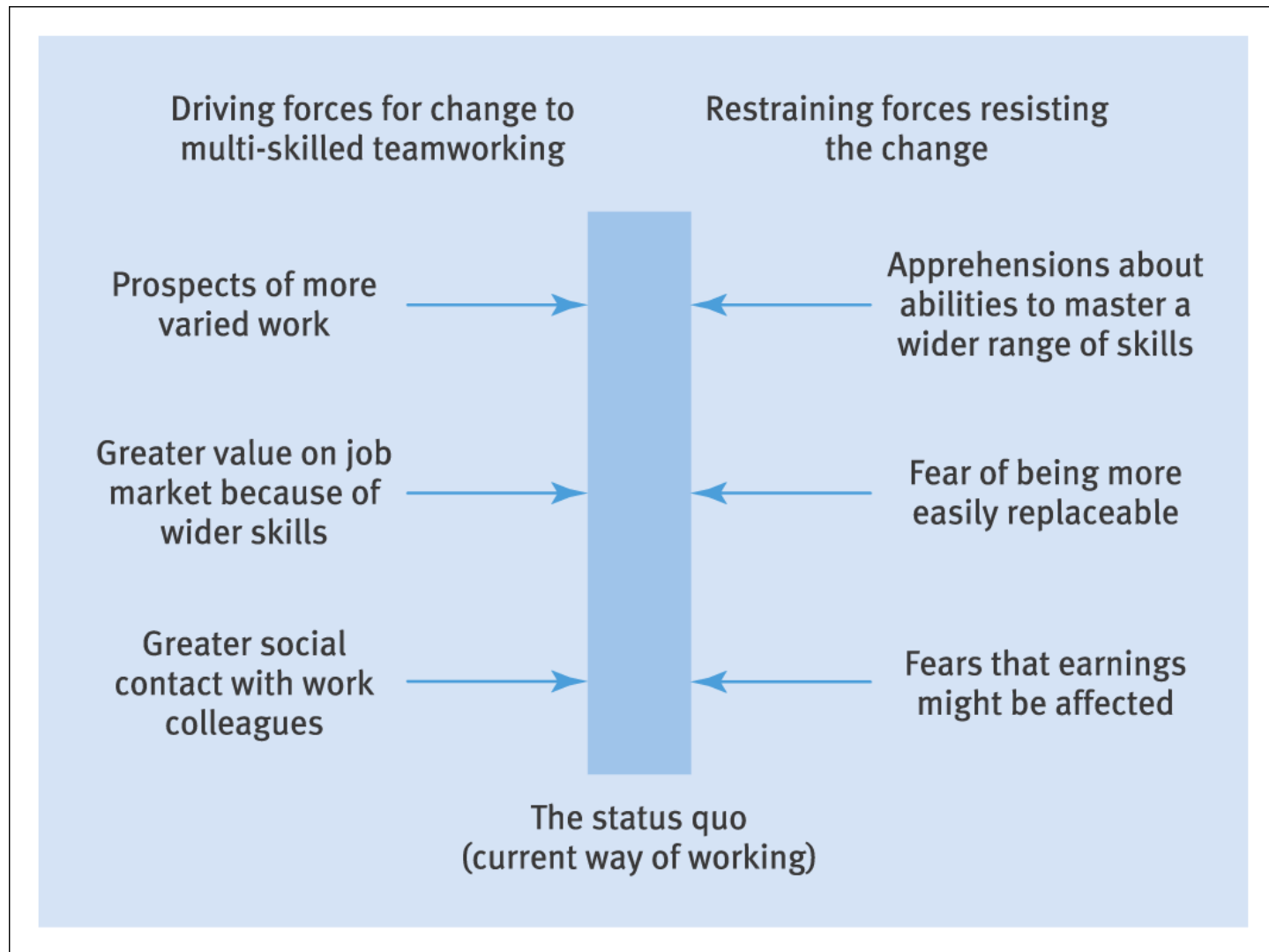


Figure 21.6 An example of Lewin's force field analysis

Lewin's (three stage) Change Process

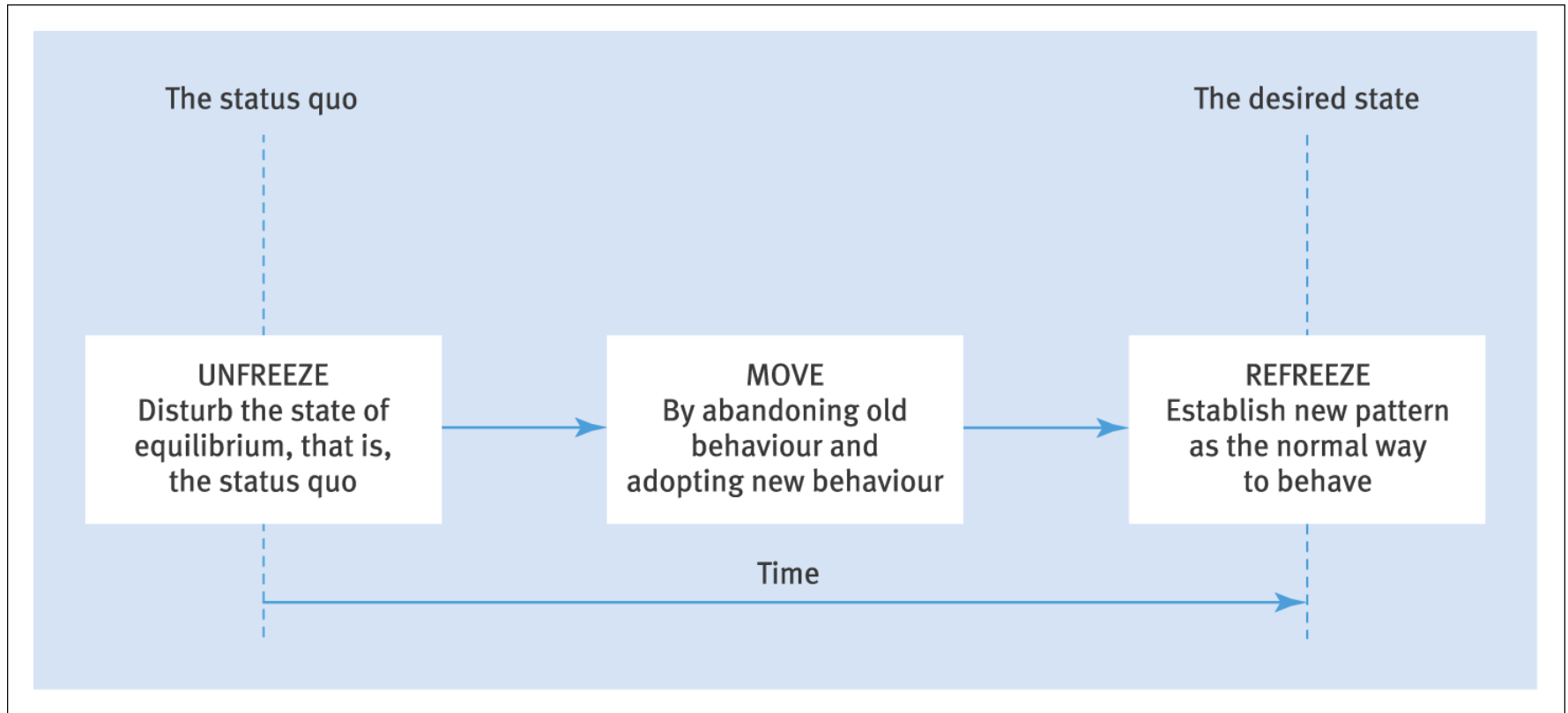


Figure 21.7 Lewin's three-step change process

Stages in a planned-change effort

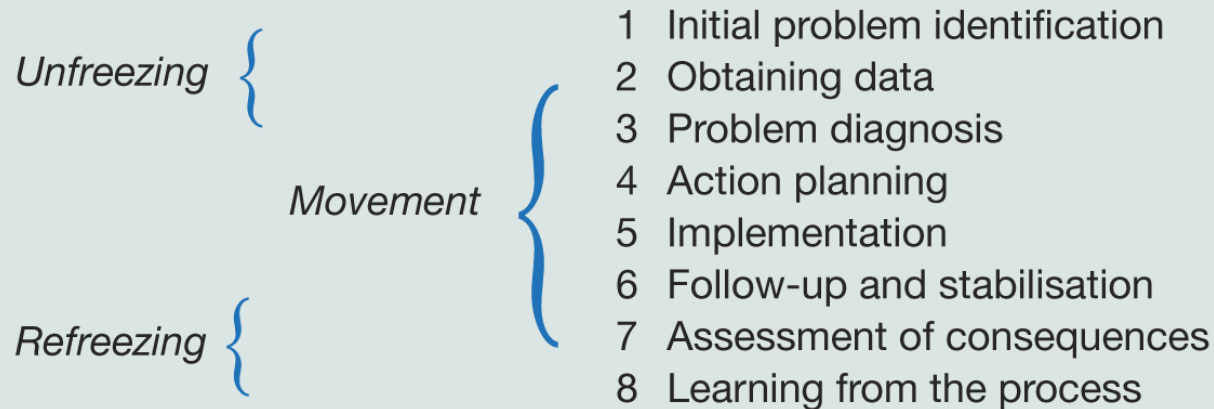


Figure 19.3 Stages in a planned-change effort

Source: Adapted from French, W. L., Kast, F. E. and Rosenweig, J. E., *Understanding Human Behaviour in Organizations*, Harper and Row (1985), p. 9. Reproduced with permission from Pearson Education, Inc.

Today's Objectives



1. To recap PID structure/format
2. To assess the importance of change in organisational consultancy
3. To review draft PIDs in the tutorial

NB

**PID submission by
16/3/18, 10am**

Turnitin via link on moodle

Next:

**Research methods
Sampling**

