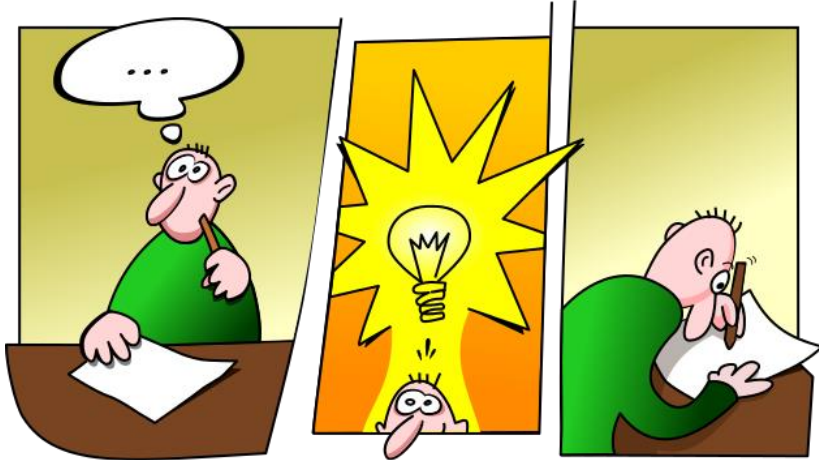




Consultancy Project

**The Research Proposal:
The Project Initiation Document (PID)**



Bid review

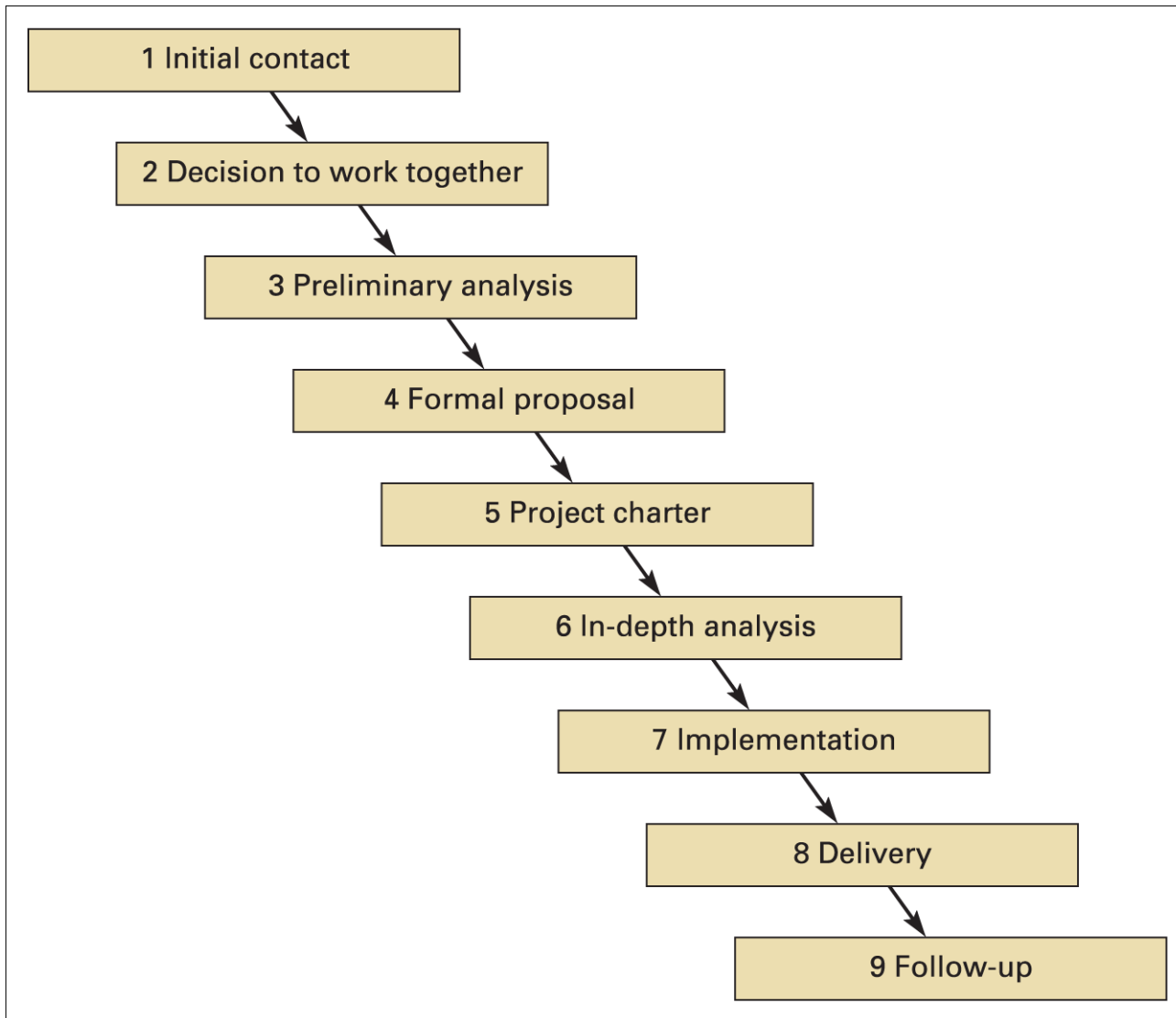
Moderation now underway

Reflect on your BID experience last Wednesday:

- What do you think went well?
- How could I have improved my performance?
- Were my project aims and objectives SMART?
- Was the verbal feedback given helpful and constructive?
- What will I now change as a result?

PID preparation

- Written BID feedback posted on moodle by next Wednesday
- Next week: research methods workshop – don't assume you know it all!!!
- Feedback on draft PIDs – you need to come in with a working draft
- Hand-in now **Monday 18 March**



Consulting process

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?

Next step: refine ideas

- Balance between researching something useful for your client organisation and your personal enthusiasm for the topic – strike a balance
- Scale – not too big, needs to fit the course requirements
- Drill/narrow down – isolate a relevant part
 - the general area
 - the more specific field
 - the precise focus of the research
- Gain a good understanding of your organisation – how?

Summary: what makes a good research topic?

- You're enthusiastic about it; it matches your career goals
- There are resources available (data/time)
- Subject is topical
- Whatever the outcome, your project will be worthwhile
- It fits the module's specifications
- It links clearly to the relevant literature
- Fresh insights are provided
- You can state the research question and objectives clearly

Turning an idea into a research project

- Identify research questions and objectives
- The questions the research will address/aims
- Precise statements identifying what you wish to accomplish as a result
- If you don't know where you're going, you'll end up somewhere else

Developing research objectives

- Add precision to the question/aim
- Clear, specific statements that identify what the research process seeks to achieve as a result of doing the research

(Saunders & Lewis, 2012:21)

- Are they SMART?

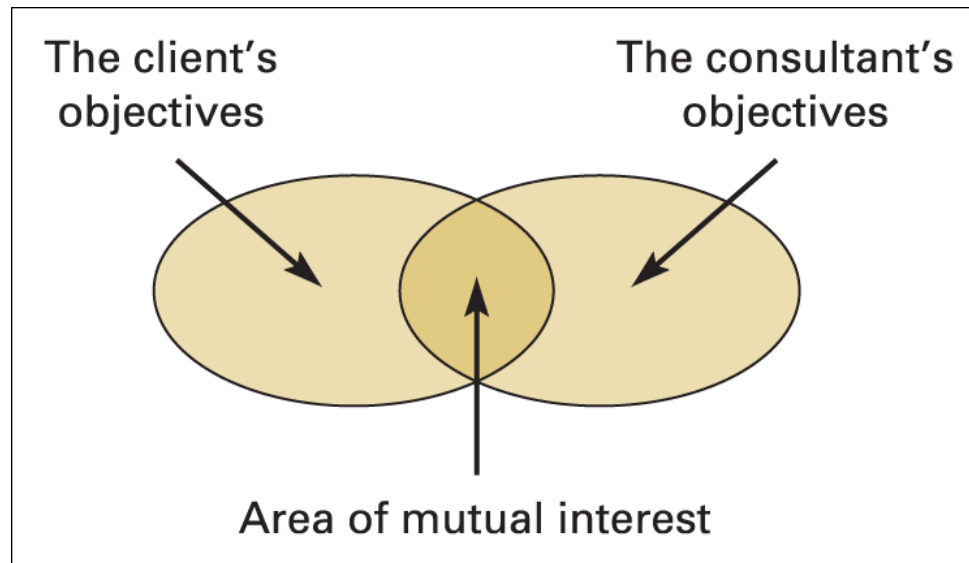


Figure 5.3 Negotiating objectives

Key objective

- **To pass the module and the course!!**
- Choose the best topic to help you do that
- Not always the easiest option

Access to data issues

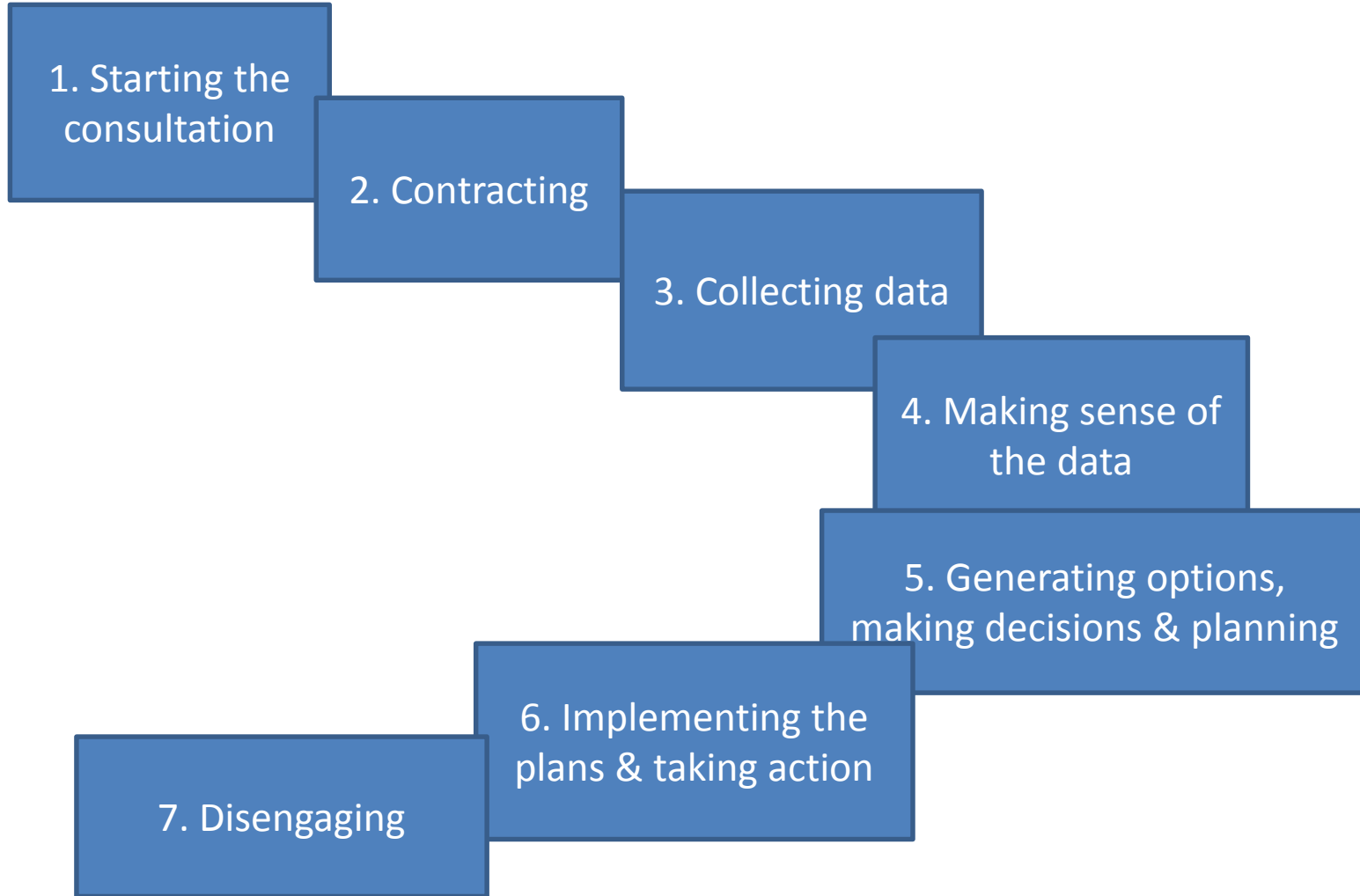
- What do you wish to collect and how?
- Extent of access required to answer the research question and meet the objectives?
- Can you get this sufficiently?

Activity: Client centeredness checklist

Complete the checklist provided which may help you to determine how client centred you think you would be if you were to work as a consultant

Source: Cockman, P. Evans, B. & Reynolds, P (1999:p428-30)
Consulting for Real people: A Client Centred Approach for Change Agents & Leaders, Maidenhead, McGraw-Hill

The Consulting Cycle involves:



The Consulting Cycle: requirements & considerations

Steps in the process:

1. Starting the consultation

- Gaining entry i.e. initial contact & starting to build a relationship
- Preparation essential e.g. have you done the ground work about your client, their situation & problems etc, what sort of impression do you hope to make?

2. Contracting

- Necessary to clearly identify client's needs & what you are prepared to do
- Identify the input expected from the client
- Establish mutual understanding & boundaries

Requirements & considerations:

Steps in the process:

3. Collecting data

Requirements & considerations:

- Finding out what is happening now i.e. collecting info relating to the existing issue
- Data sources may be factual e.g. from staff or records, opinions/feelings, views of internal/internal customers
- Have you identified organisation constraints, policies /procedures which help/hinder?

4. Making sense of the data & diagnosing the problem

- Need to reflect, question, discuss data with client. Insufficient data? Collect more
- Too much data? Sort & decide what's relevant, present clearly
- What is the problem? Is the client 'dealing with the symptoms rather than the real problem?'

Steps in the process:

5. Generating options, making decisions & planning

Requirements & considerations:

- Problem diagnosed? Identify options & possible solutions
- Support the clients choice but make them consider the implications to ensure it's right for them
- Detailed action plan needed. Detailed scrutiny by client needed to see potential problems, costs, resources, time etc
- Does the client understand the process – is some theory necessary

Steps in the process:

6. Implementing the plan & taking action

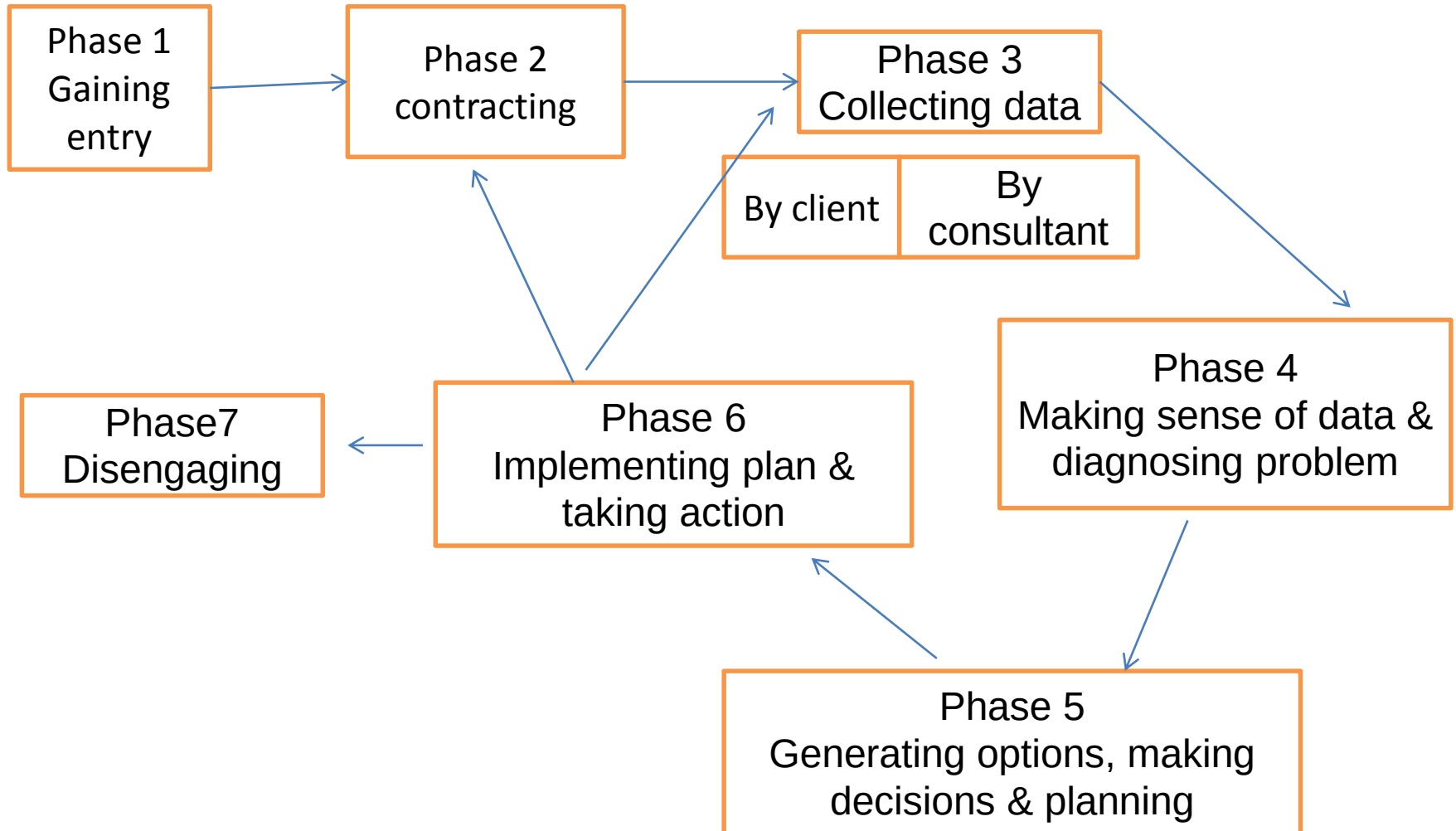
- Is your work complete when your report & recommendations are submitted?
- If involved in the implementation remember the problem & solution belongs to the client
- Monitor, mentor, encourage, support, confront, counsel, train - don't take ownership
- Barriers to implementation linked to capability, organisation, ownership, leadership

7. Disengaging

- Is the problem resolved, have the solutions worked – disengage with confidence
- Still issues? Revisit the cycle re- examine data, decisions , plans , is more action needed?
- Take care to end the process satisfactorily. Your reputation depends upon it!

Requirements & considerations:

The Consulting Cycle: the full circle



Task: The Hotel Inspector

<https://youtu.be/GsxU43Xg9Io>



PID preparation

- Written BID feedback posted on moodle by next Wednesday
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- Hand-in now **Monday 18 March**

The Project Initiation Document (PID)

- A proposal for a project with a company
NOT the project itself.
- Your PID tries to sell your project and yourself to the company – do not give them solutions in this document

Purpose of the Project Initiation Document (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

What should be covered in the PID?

- **Project objectives** - must be SMART: Specific, measurable, achievable, realistic and time bound
- **Project justification** – why is the project necessary
- **Business Case and Approach** – background and key literature
- **Project team** (yourself) – why should *you* be the consultant? Sell yourself but be realistic.
- **Planned communication strategy** – how would or will you communicate with the company?
- **Project plan** – what you want to do and a time plan
- **Research methodology** – which research methods are you going to use and why
- **Costs** – which costs is the project likely to incur?
- **Benefits** to the company

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

- 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?

Exemplar PIDs

Copies of previous 'good' PIDs are now available to view on moodle. They have been anonymised.

As they were uploaded to turnitin, please be aware of potential plagiarism issues if you follow them too closely, but they give you an indication as to the format required.

Next week:

**Research Design &
Methodology**

Look at draft PIDs

**1-1 tutorials to review
progress**

