



**RESPONSE TO SKILLS PROGRAM - COVID-19
SITUATION**

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Laura Bucurean
Student Number: 2018077281

Lecturer: Shehla Khan
Internal verifier: Marie Pitson

Module Unit : Project Planning and Management Skills in the Workplace

PROJECT

Clive Atkins & Co Ltd -In Response to Covid-19 Pandemic

First “Project *is the way that organisation accomplish change and specific objectives*”.
(Tran,2020)

The report will present the critical analysis of the project and tools, showing how Clive Atkins Limited is dealing with the Covid-19 situation.

Clive Atkins & Co Limited is located in Swansea and specialises in professional accounting services. With 18 employees around different departments over three levels in a big lovely building, the company's core values are professionalism and friendly service.

This project is unique as is built upon personal experience and was chosen to show how Clive Atkins Limited responded and adopted changes to its business activity in response to Covid -19 .

The Project aim is to keep staff and clients safe while delivering quality of work from home, within set time frame, collective effort, and series of activities used to achieve this goal. The key objective is to control time, cost and frequently monitor the progress of the project.

PROJECT MANAGEMENT

Project Management “is the process of delivering the project through controlling its achievement”. The tools and techniques should be applied without disturbing the daily operation of the company. (What is project management? 2018)

PROJECT MANAGEMENT LIFE CYCLE

The project life cycle *“Is a series of activities that are necessary to fulfil project goals or objectives”.* (What is the Project Management Life Cycle? - Clarizen, 2020).

The key objective includes clear start and finish and clear aims keeping focus to meet objectives and goals, involving team roles and people that are able to make a change.

The theory of life cycle developed by Paul Hersey and Kenneth Blanchard refers to bring the staff skills, experience, and knowledge to accomplish the project goals.

Project management life cycle include five phases: Project Initiation, Planning, Implementing, Evaluating and Closure, and allows everyone to identify how the project is processing.

Project Initiation is the most significant step in Project management, as provides the foundation of the business.

Due to the epidemic spread of Corona virus (COVID-19), the organisation was forced to take action to contain the pandemic's spread and prepare measures to adopt. At the beginning of March 2020, we were facing unprecedented challenges and implications in the workplace.

Clive Atkins was taking actions to adopt to the current situation and changed the business activity, prioritizing staff, and client's health by working from home and cancelling face to face meeting with clients.

Planning:

The first step was that most staff to work remotely from home, providing technical support to access all needed client's information using cloud-based software. Two of the employees are still working in the office as is needed to answer telephone calls and deal with the mail.

The company had to make major changes for employees and client's safety. The two workers in the office are keeping distance by working in two different departments and taking turns to use the kitchen and toilets facilities. Wall hand sanitizer are located for the clients to use when drop off their records, which are safely left on the little table at the entry and collected by us afterwards to process the work required.

Implementing:

Work and client's queries are dealt with by phone and emails. Communication between staff regarding client's tax returns, accounts and furlough claims is managed and directed by tax manager every step to put the work plan into action.

Evaluating:

Working with teams from all departments to reach clients deadline by checking daily the progress on the work and determine if there is any issue in the results of delivering the goal proposed.

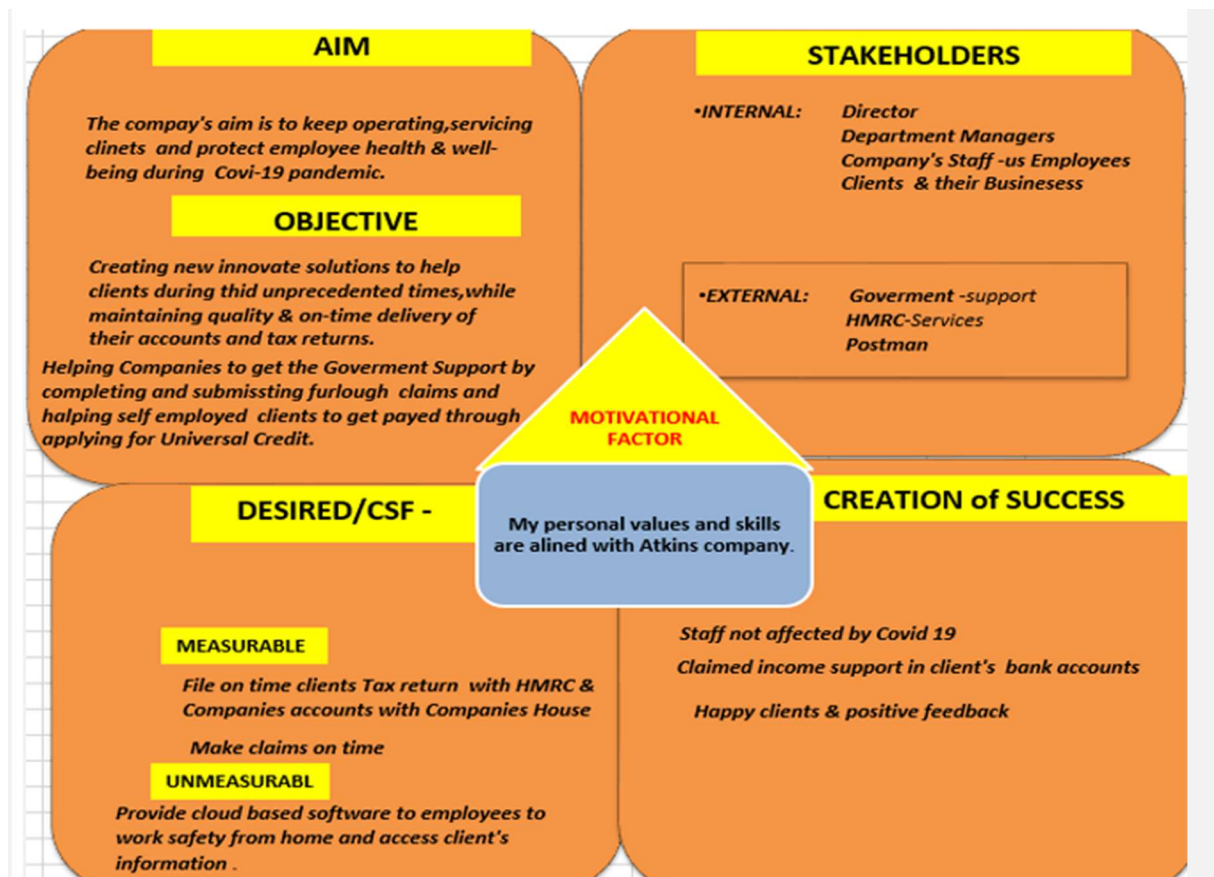
Closure:

The final step includes meeting deliverables .All paper work are completed .Clients tax returns ,accounts and furlough claims are submitted while keeping everyone safe .Clients have received payments from Government support and settled the fees in respect to the work carried out . Staff are paid end of the month, completing the costs involved in the project.

QUAD CHART

“Quad Chart “used for planning purposes and helping to identify exactly what the project is about. (Project and Award Quad Chart Guidelines, 2020)

Clive Atkins Company focuses on maintaining employee health & well -being & servicing clients while taking decisive action to protect its long-term financial health & position Quad for post -pandemic success. This is represented in the Chart below:



SECONDARY BENEFITS:

- One of the greatest benefits is to work despite the fact that the staff were not able to access psychically client's files
- Keeping safe by working from home
- Opportunities to train new software and give confidence to stay in the workplace.
- Also being more involved in new tasks allocated
- Reduce the company's running costs
- Furlough some employees whose work is required in the office.

The **CRITICAL SUCCESS FACTOR** is a management term for an element that is necessary for an organisation or protest to achieve its mission!"

Desired Outcomes:

Bringing all records in before deadlines, answering queries related to complete tax returns and accounts, Customers desire outcome was successfully achieved through their effective interactions with the company.

Critical Outcomes is essential for the project to be successful. The project is specific and realistic because the goal was achieved involving all employees knowledge, skills ,attitudes and changes that the organisation went through .The measurable statement shows that even though the Covid-19 pandemic is still ongoing, the company keep the quality of work and safety guidelines reaching the project goal.

CREATION OF SUCCESS:

Quantitatively:

- Keeping 18 staff employed
- Keeping 450 clients and work up to date

Quality:

- Receiving positive feedback from clients
- Receiving appraisal from managers and boss for carrying out quality work on time.

STEKEHOLDER ANALYSIS

Stakeholder analysis “is the process of systematically gathering and analysing qualitative information to determine whose interest should be taken into accounts when developing and implementing a project”. (HELMAN, 2019)

Clive Atkins company actively engage with different people, such as staff, customers, postman ,HMRC and Government .

		STAKEHOLDER PERSPECTIVE	ACTION
H	DIRECTOR	Responsible to act in the interest of the company ,employees and clients .	Keep clients finances and offer guidance and support for businesses.
H	MANAGERS	They are the critical component to deliver succesfully our work.	Offering employees training and support to deliver quality work.
H	EMPLOYEES	Deal with customers tax affairs.	Keep safe and provide quality of work and right amount of tax payable.
H	CLIENTS	To support the company by investing in our services.	Ensure safety of employees and clients and control what organisation can do .
L	GOVERNMENT	Set guidance and rules.	Ensure safety of employees and clients.
H	HMRC	Provide tax services .	Ensure all taxes are paid correctly.
M	POSTMAN	Taking and bringing important correspondence to the company and clients.	Making sure all correspondence are delivered

Carrying out the Stakeholders analysis show additional differences.

People needs to adjust to the new changes and accept it as a necessity, therefore, to communicate through the right channels, it is important to achieve the communication objectives.

Interaction with Internal stakeholders in Clive Atkins company is important because employees and managers are the one who do the work and contribute to the business project success. The director is therefore responsible to act in the interest of all of us.

Clients are the heart of the business. The communication in Clive Atkins Limited is up to date and is done through phones and emails between staff and clients.

The little post man has an important role for the company as through his hard work all correspondence is received and sent further on to clients and HMRC.

Interaction with the External Stakeholders are also important .For example :

HMRC: is an important Legal Authority performing to maximize tax avoidance. It has a high importance to the business and effective communication is needed for businesses and client's taxes.

The company communicates with Hmrc on daily bases, on the phone, online services, and

letters about client's tax affairs and its communication is vital for complying with tax regulation.

Government is another main professional body for public service communication, and it is important for regulation and taxation but have lower importance on Clive Atkins Company because HMRC is the main communicating body the company is delaying with.

RISK ANALYSES

Risk is the possibility that you may not achieve your project. Risk analysis is the process of assessing the likelihood of an adverse event occurring within the organisation, (How Risk Analysis Works, 2019) Please see below my risk analysis table:

RISK ANALYSIS

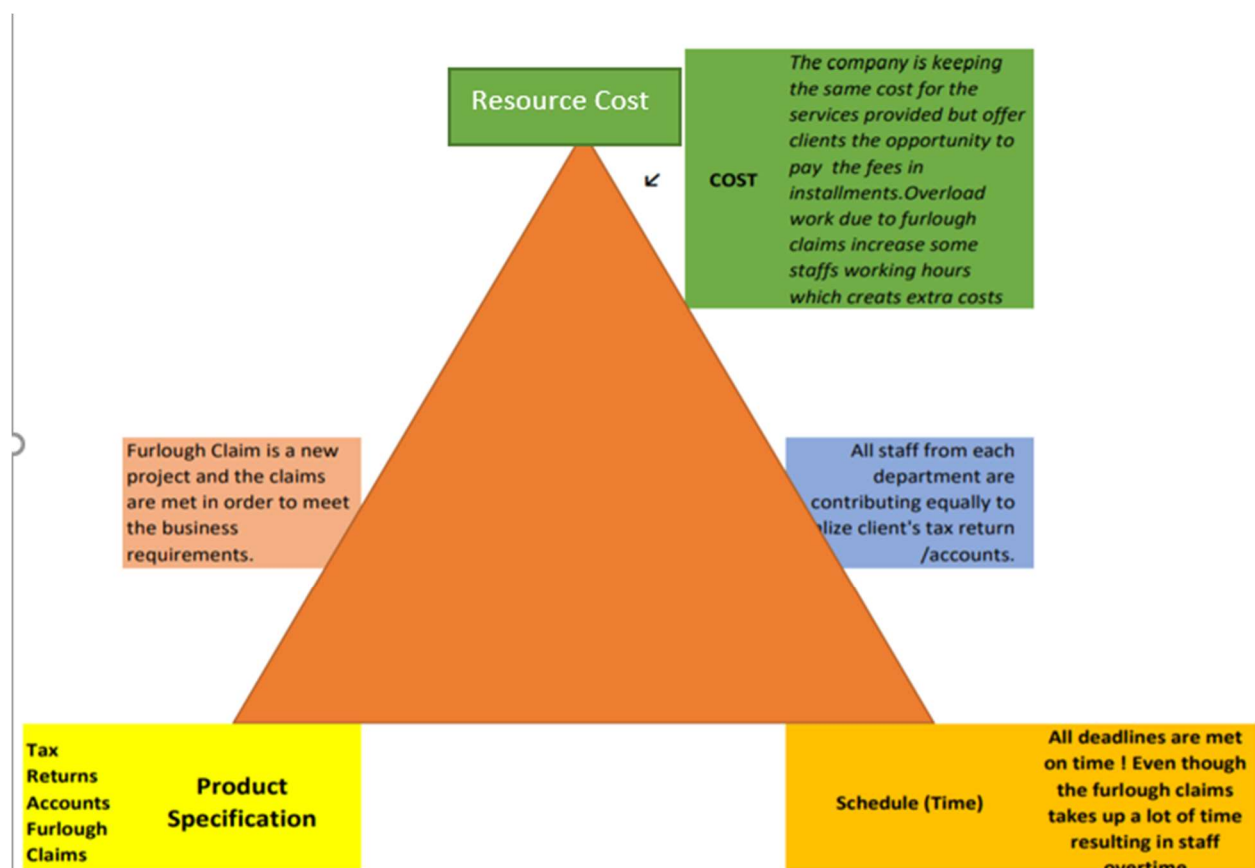
Clive Atkins & Co Ltd in Response to COVID-19

IMPACT	LIKEHOOD	RISK	MITIGATING ACTION
High	High	Protect employee's health Internal	Allow to work from home Cancelling face to face meetings
High	Medium	Staff not confident to deliver tax returns on time Internal	Provide software to be accessible by everyone at anytime
High	High	Clients Internal	Provide hand sanitiser when records are dropped off Provide online support
High	Medium	Government External	Implementing rules to allow employees to come back to work

Risk Analysis is made of three main categories that Clive Atkins faces and needs to overcome. These are shown in the Triangle below underlying the Resources, The Project specification and Time Project -Schedule which is the business priority. The company has introduced a new service as Furlough Claims which did not exceed the running cost for employees submitting them and is been the project success as increased the business profits.

IRON TRIANGLE

Can Give a Useful Overall Picture as part of the Decision Making Process(Beyond the [iron triangle](#), 2020)



The quality of work was maintained, the profit was increasing due to the furlough claims and tax deadlines were met on time.

PESTEL ANALYSIS

PESTLE Analysis” is a tool that is used to identify and analyse the key drivers of change in the strategic or business environment”. (Understanding a PESTLE Analysis and Its Components, 2016)

The tool allows Clive Atkins Company is to assess the current potential changes and be able to respond to changes more effectively.

Political

Even though Covid -19 should be more a health issue than Political, the pandemic presents significant challenges to people and businesses. Tax Policy, Regulation and Services have changed dramatically. Businesses are struggling to make tax payments because of this severe difficult time.

Economical:

The pandemic had an immediate impact on client’s businesses, and direct effect on employers with huge impact on Government. The Government launched furlough schemes to help employers to pay the staff during the lockdown .This scheme is called “Coronavirus Job retention Scheme” to encourage employers to keep jobs, had a massive impact on Economy as the State pays the employers 80% of employees salary up to £2,500 a month until 30TH June 2020 after which new rules will apply. (Martin Lewis’s quick reaction to the furlough updates, 2020).

According to a Briefing Note on 25th June 2020 “Governments worldwide have already allocated more than \$13 trillion to stabilize economies in freefall and restart growth”.

Social: The most obvious form of social change to emerge from Corona Virus crisis effected employees and client’s way they feel about returning to public and offices. Even after restrictions will be lifted attitudes towards close social contact will affect the business normal activity.

Technological:

Due to the social restrictions, the company has improved its technological way of dealing with clients moving to a digital cloud based software way of working as a result of lockdown ;Staff and clients relying more heavily on e-commerce; Emails, telephones but also Media as Face Book and Instagram are the new main point of contact and communication.

Environmental:

According to BBC News" *The pandemic has brought widespread job losses and threatened the livelihoods of millions as businesses struggle to cope with the restrictions being put in place to control the virus*". (Martha Henriques, 2020). With employees working from home one of the most important aspect is that the transportation is reduced, and the carbon emission had dramatically dropped.

Legal:

The tax authority HMRC, has allowed businesses to defer tax payments and extended deadlines for filing tax returns, which is been a relief for clients and their businesses.

SWOT ANALYSIS

SWOT Analysis "is a technique used frequently in project management to assist with decision-making". It is useful for project planning and risk management of complex projects and, as a consequence, it can also help to improve teamwork within a project team. (Naybour, 2018)

Strengths:

One of the company's strength is that employees are very skilled, having the relevant qualification to deal with situations and deliver high quality of work to clients.

Weaknesses:

Unfortunately, an issue occurred when the new software used was not accurately syncing client's data through staff computers coursing discrepancy in the work process and delays in completing clients tax returns.

Opportunities:

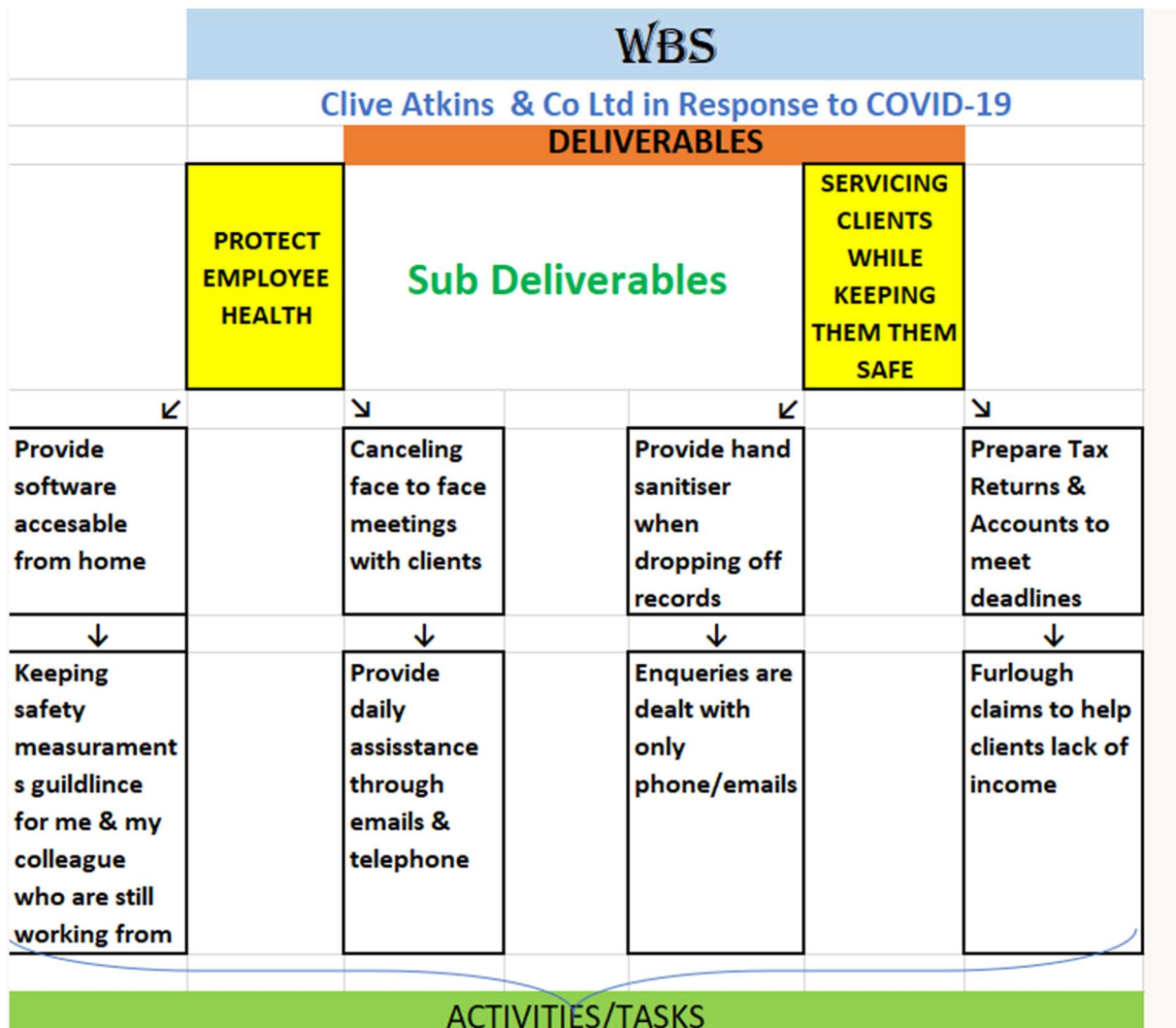
Opportunity has arisen for some staff to train and gain experience in different fields across the departments. The new service introduced on furlough Claims was undertaken through online courses which is a great opportunity to keep on top on the clients businesses operation for the challenges that lie ahead.

Threats:

Due to Covid-19, HMRC is facing a high demand in clients furlough claims but lack in staff to deal with the requests resulting in clients complaint which also puts stress on employees and overload work which creates less attention to the normal job .

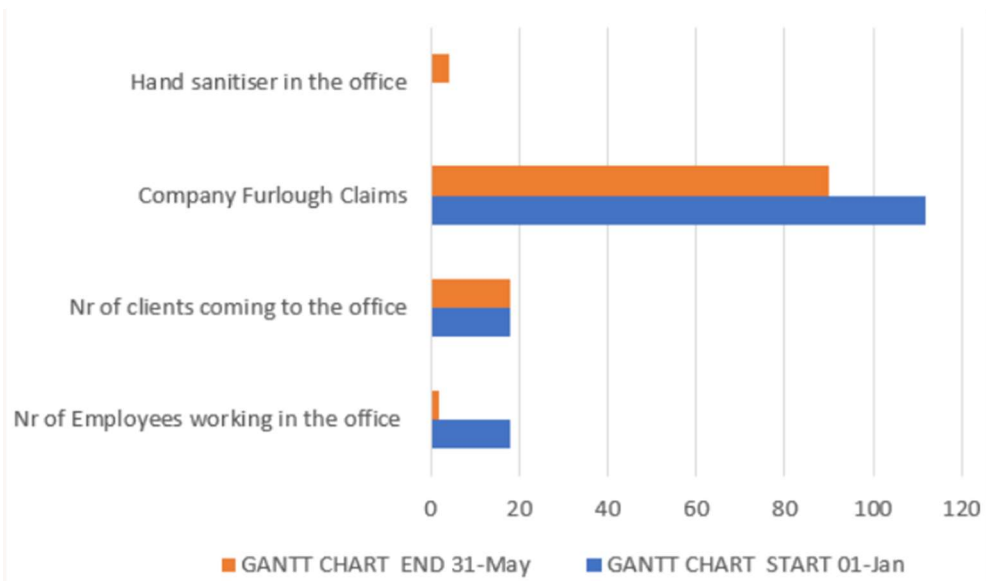
WORK BREAKDOWN STRUCTURE & GANNT CHART -TOOLS & TECHNIQUES

Work Breakdown Structure (WBS) "is a key project deliverable that organises the team's work into manageable sections". (Project Management Work Breakdown Structure (WBS) Flashcards | Quizlet, 2018).



The Gantt Chart " is a bar chart representation of tasks over time". (Clark, 2012).

The key success in a crisis like this Covid-19 pandemic is preparation. The Gantt Chart helped the company to stay on target for deadlines and stay on top of projects. Below is the business chart illustrating the project schedule and duration of each activity performed.



Clive Atkins & Co Ltd -work activity and duration is proposed to continue the same in the near future as the pandemic is still ongoing and also waiting on Government updates,

MONITORING, EVALUATING THE PROJECT AND MANAGING CHANGE

The project was evaluated through two faces Mid Project Evaluation and End Project Evaluation including two methods:

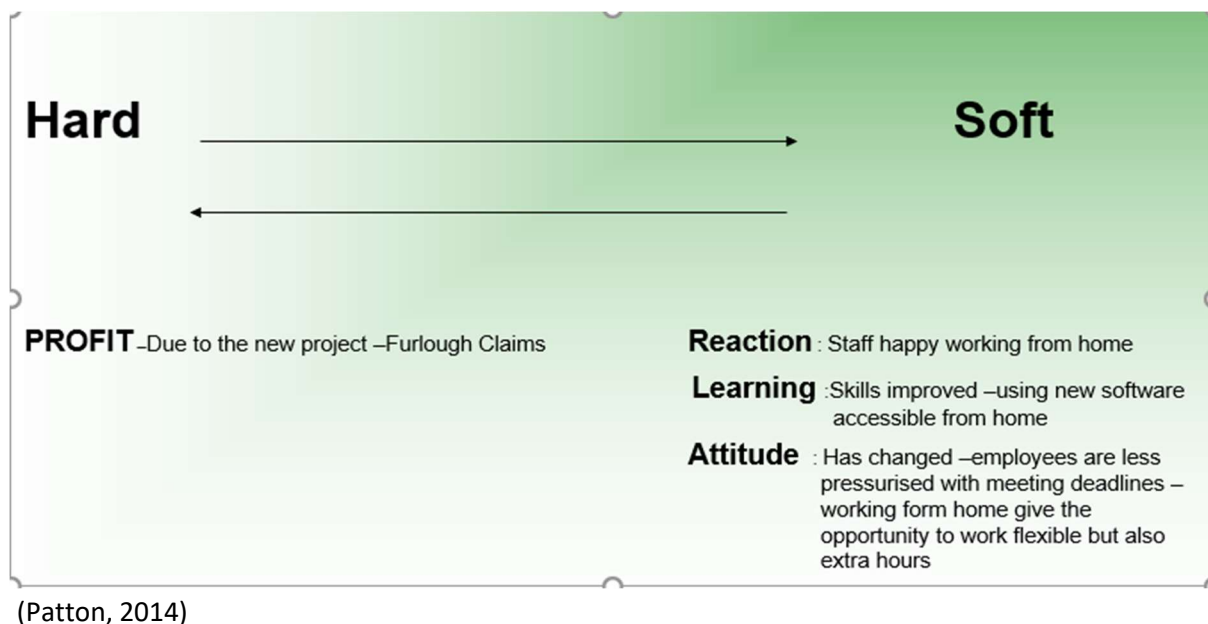
Subjectively :

Tax and accounts as a matter of fact, are deeply an opinion as subjective. Accounting judgement works for Clive Atkins Company and clients, and estimation is expected for the staff to balance the books and complete the work required .The whole practice had a positive opinion that the work can be carried just as well from home as from the office.

Objectively :

In the true sense of accounting, accounting it said to be objective due effective facts that are based on solid evidence.

The principle is that managers, accounts and tax departments eliminate decisions based on their opinions and bias using financial statements to find out if the project is doing well or not. During the period working from home staff submitted 62 tax returns since 5Th April 2020 tax accounting period ,104 accounts completed, and 300 furlough successful claims resulting in an increase of profit by 12%.



We managed to monitor the outcomes through work spreadsheets, staff timesheets and their participation in delivering quality of work and meeting deadlines.

The project was achieved by working from home keeping save and provide quality of work to satisfy clients.

One part of the project did not go well and was due to the system used that did not sync properly from all computers resulting in misled information when analysing client's data. Also, some employees were not properly trained in same areas and led to mistakes.

McKinsey 7S Model is an organizational tool that assesses the wellbeing of seven internal factors of an organization as a means of determining whether a company has the structural support to be successful." (Understanding the McKinsey 7S Model, 2020)

The results based on MCKENSEY'S 7S Model, shows that Soft outcome was more useful as employees gain more confidence & knowledge for long term. The Hard Outcome - "Profit" has always been part of running the organisation.



THE TRANSITION CURVE

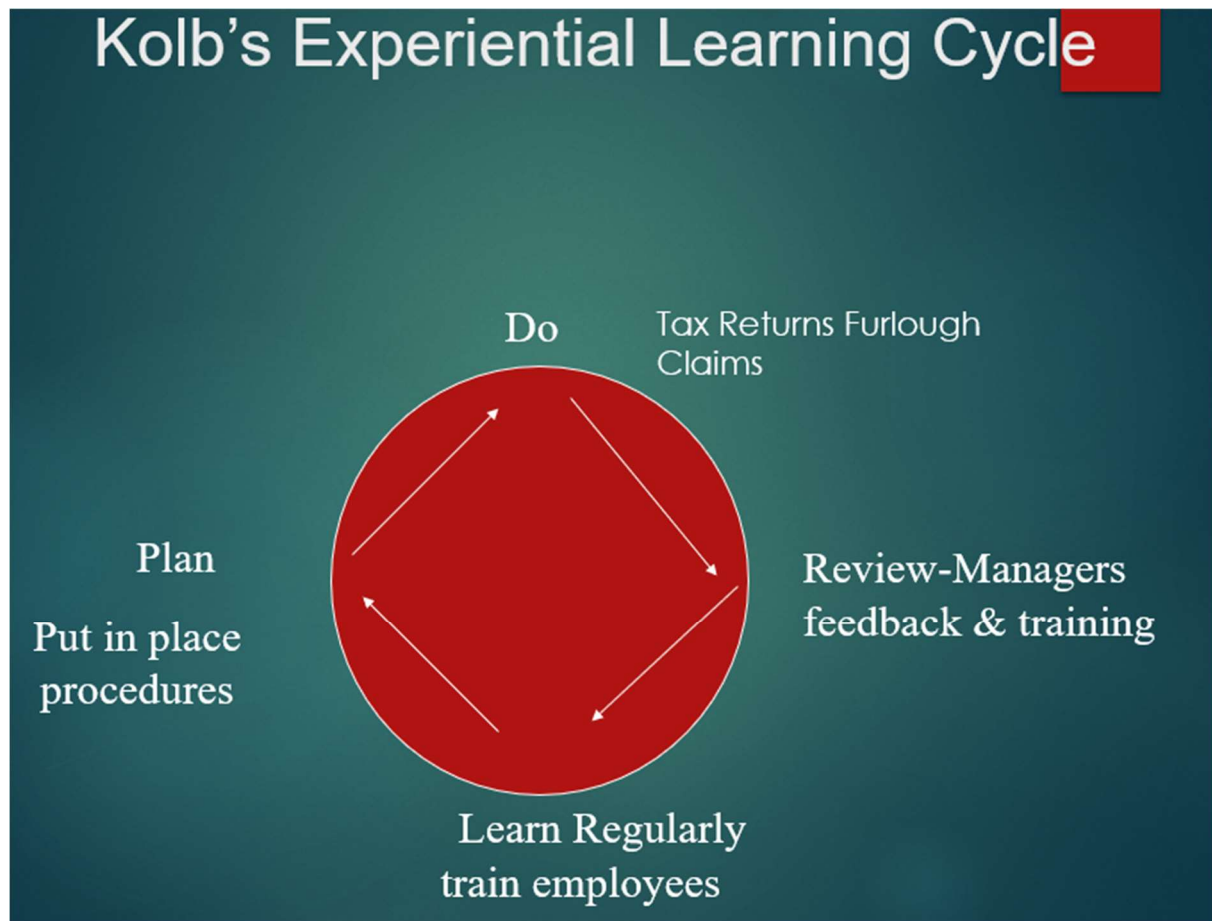


(Compliance, 2019)

The transition curve shows the ups and downs of how employees and generally people feel during the pandemic crises.

Employees felt more emotional and distress and feared that they might lose their jobs and fear about the current situation. As the time have passed on, it has been a realisation that the work can be carried on from home, receiving income and staying safe.

Clive Atkins has the duty to ensure health and safety for employees and clients as well. Taking the risk analysis helped everyone to be more cautious about the current situation.



The project deliverables were evaluated regularly throughout the process to finish.

Looking at the whole project, during the Evaluation Phase it has been identified what went wrong but also well in the project and learned from the mistakes to improve for next time. Kolb's Cycle was a great contribution to this project.

Going through the process Using Belbin's theory we discovered that each of us participated to the project process collaborating with other in a particular way. According to Belbin's theory "people in teams tend to achieve different team roles". Employees must work together to achieve the organisation project.

Analysing the Strengths, it has been proved that staff are free thinking, coming up with ideas and solutions to solve the issues occurred when tasks were allocated to the ones who were not trained on to process furlough claims but with initiative to get it done.

About Weaknesses aspect it has been discovered that some staff were taking advantage of not working within the team physically being occasionally ignorant to complete tasks and

communicate effectively. Others might moan because they have to complete furloughed staff work .

“Gallup has discovered that weaknesses never develop into strengths, while strengths develop infinitely”. (The Big 'W': Let's Talk About Weakness, 2018)

“It is common knowledge that we work best when we play to our strengths” to have productive relationships with other colleagues and take pride in the work. The ability to temporary transform from a team player to work individually from home have been effective, easy to manage keeping regular contact with the team from all departments.

Feedback has been a central component at the company's management system providing staff with regular feedback. Particular attention is paid on interpersonal relationships between staff, discussing work issues and training on the new tasks and praising the work carried out to meet the project goal, keeping the staff safe and provide quality work to the business customers.

The affinity diagram tool helped to analyse ideas generated during brainstorming, and expressed the issues occurred under discussion with the management, creating review results with the team and other key people. (Kawakita Jiro, 2017)

Overall, using management tools, and techniques to analyse the project helped to identify the gap issue and thinking new ideas to carry on further on.

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