

# PROJECT PLANNING IN THE WORKPLACE



**Suhail Miah 1808197**

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**Managing Projects In The Organisation**

**Lecturer: Paul Ranson**

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## Executive Summary

This report will focus on a scenario of managing a project and analysing what are the risks and challenges. The objective is to create a project management plan for a local family business, successfully relocating their business. The scenario will be applied with project management techniques and methods to achieve the goal. The project will involve the usage of user stories and Gantt charts to produce a plan and schedule for the project. Finally, the project plan will be proposed to the Vintner family.

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## 1.0 Introduction

The purpose of this project is to apply project management tools to successfully plan a project for a small local family business.

### **What is Project Management?**

Project management is the goal of producing an end product that will benefit the organization that initiated the plan. It is the initiation, planning, control to achieve the end product. Some areas that require formal management are those that create something new or altered, tangible or intangible. Projects usually have a defined period, a starting and an ending timeframe to keep in mind. Many different teams are required to work together to accomplish the desired outcome. Project management also involves the management of risks and drastic changes that may occur as part of the project. (APM, 2020)

### **Benefits of Project Management**

Using project management increases the likelihood of achieving desired outcome of a project. Efficient use of teams and management is another positive of using project management. Also clearly identifying and satisfying stakeholders requirements are met, while planning a project. (APM, 2020)

## 2.0 About the Organisation

The case study is focused on the Vintner family business which is an antique shop based in the Highstreet in Shirley, Birmingham. The size of the business is relatively small and this move is to potentially expand the business,

### 2.1 Objective

The objective is to relocate the Vintner's Antique shop from the Highstreet in Shirley, Birmingham to the warehouse in Solihull, while also planning to take the business online

To successfully implement the plan the stages of the project will be broken down to achieve it. The Waterfall project management approach has been chosen to implement the plan. The waterfall technique is a consecutive method of project planning and the stages will flow directly from one phase to the next. (Petersen, et al., 2009)

**The Vintner's project team are:**



**Doreen Vintner**

Accountant, runs a tight  
business, obeys all the rules



**Denis Vintner**

Doreen's brother  
Searches for the antiques. Has a passion  
for old stuff.



**Suha Madani**

Handles the customer services. Everyone likes her. Just returned from a year away.

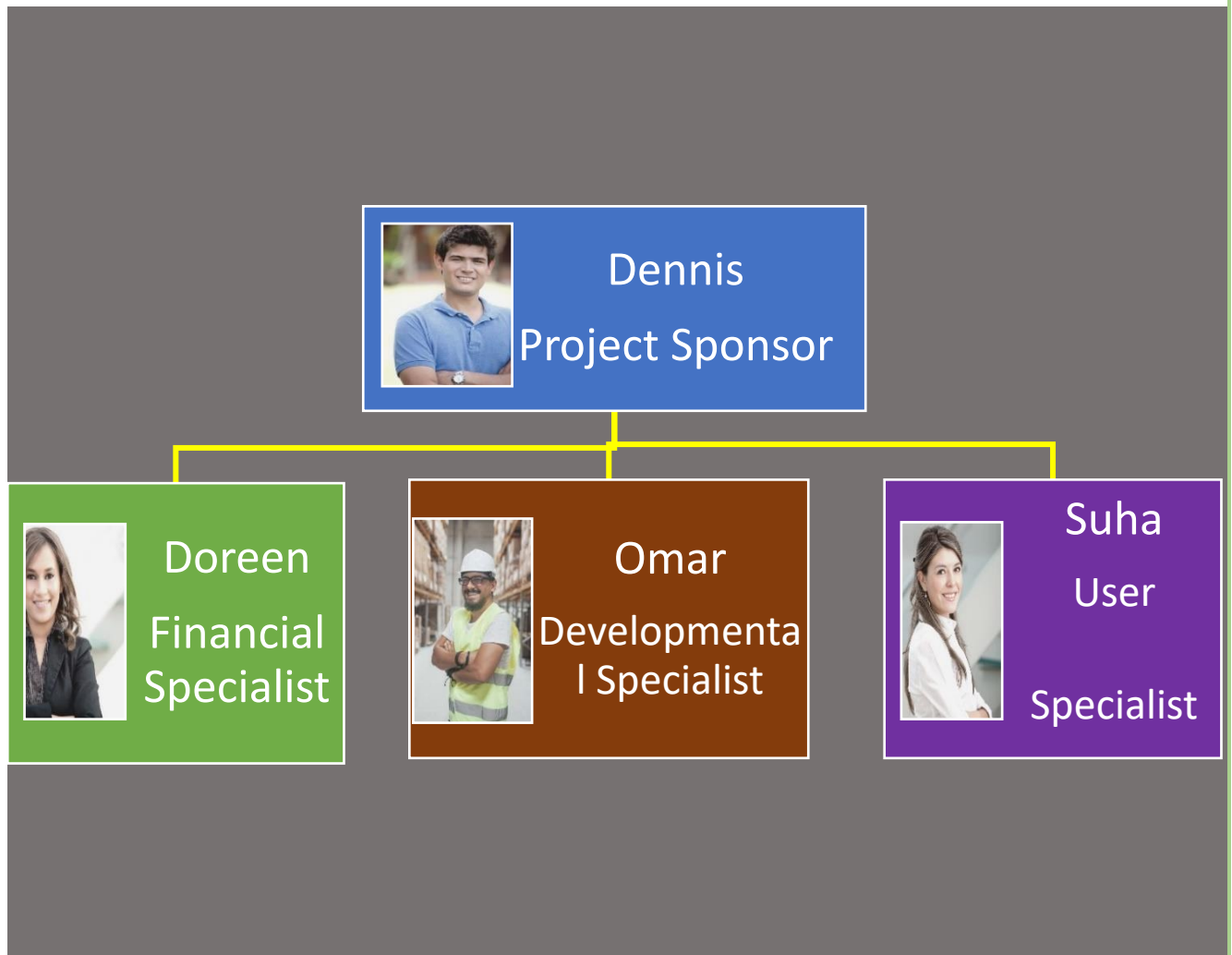


**Omar King**

General all-rounder. Has worked in the shop since he was a boy. He knows where everything is.

### 3.0 Project roles

Defined job roles or titles can help to ensure employees to adhere to their responsibilities and reduce possible role conflicts (Roberts, 2011). Using the Roberts technique, a hierarchy has been created for the project. Explanation of why each person has been assigned a role will be important to getting the approval of the project sponsor.



## **Project Sponsor**

The Project sponsor has to be the head of the project and oversee that everyone will adhere to their specific role and meet their goal. Dennis was chosen due to the fact he is passionate about antiques and it seems it would be a great choice as he's part of the Vintner family. Project sponsor will need to regularly meet with the steering group to schedule weekly meetings to update at each stage of project.

## **Steering Group**

Steering Group is made up of three members each as a specialist in 3 different roles focusing on the user, financial and development areas. The Steering group will work closely with the project manager. Their expertise in different roles will help bring the project to the desired goal. The steering group is far easier to control if there are less people in the group. (Roberts, 2011)

## **User Specialist**

The user specialist focuses on the needs of the users. Usually this is the customer of the organization and considering their needs and requirements is a crucial element when creating products or services. Suha was chosen as the user specialist she is excellent with customers and well liked, making her the perfect candidate for understanding customers or the user.

## **Financial Specialist**

Understanding how much budget and staying in budget is a large role of the financial specialist. Doreen is the financial specialist as she is already an accountant and is perfect for this role as she already has experience controlling finances. Doreen as the financial specialist utilises her skillset and would be a great advantage.

## **Developmental Specialist**

The developmental specialist is responsible for designing and creating the items or infrastructure to make project a success. Developmental specialist will need to work together with project sponsor to fully comprehend what is required. Omar was chosen as the specialist as he is an all-rounder and also extensive knowledge of the items.

## 4.0 Iron triangle of project management



*Figure 1 Iron Triangle Source: Prince2.com*

The Iron Triangle states a project manager has three constraints that must be considered while undertaking a project. The triangle is made up of three different factors which are Cost, Scope and Time of which quality is in the centre and is affected by the level of detail that goes in to three points. In the project plan properly discussing with the project sponsor and team members what is required of the project. Agreements on certain trade-offs and compromising on certain variables to a degree must be discussed to have a clear view of project expectation. (Caccamese, 2012). If the plan must not exceed budget then limitations must be fully discussed. Overall project managers need to have a clear understanding of all the constraints of the project to make informed decisions to best meet the specific goals.

## 5.0 Potential Risks

Whilst managing a project it is important to understand that there are a few risks that can happen which may affect the project and not go according to plan. Some examples of unexpected risks are poor suppliers, weather disruptions, members becoming ill or leaving or even equipment breakages. Risk management must be considered early on in a plan, in order to reduce their impact. Having contingency plans in place can help get things back on track and also gives quick responses in the event of such unplanned problems. Many project managers delay their decision making and it is a common error. Team members should plan ahead for “what could go wrong”. (Heagney, 2016)

In the Vintners family business because it is a small size business, people may not adhere to their roles fully. The risk of overstepping their roles and responsibility and putting their attention elsewhere which can cause many issues and confusion and may even hinder a project. (Richardson, 2019) If the financial specialist sidesteps their role into the design side of things, the result may be disastrous as their knowledge and background is not fully experienced on the same level as the developmental specialist. Potential sibling rivalry between Dennis and Doreen can cause conflict about their own personal views about how certain phases of the project should be overseen. Creating the project hierarchy with defined roles can help reduce the risk of role conflict. As the project manager can step in and advise that the defined roles are there to understand their own responsibilities. Ultimately the sponsor has the final say in the overall project, regardless of views of the steering groups and project manager. It is important to get the sponsor's approval and sign off on the proposal in order to have their backing. A project manager has no real power in the organisation but is hired on a contractual basis which is the norm. (Roberts, 2011)

## 6.0 User Stories

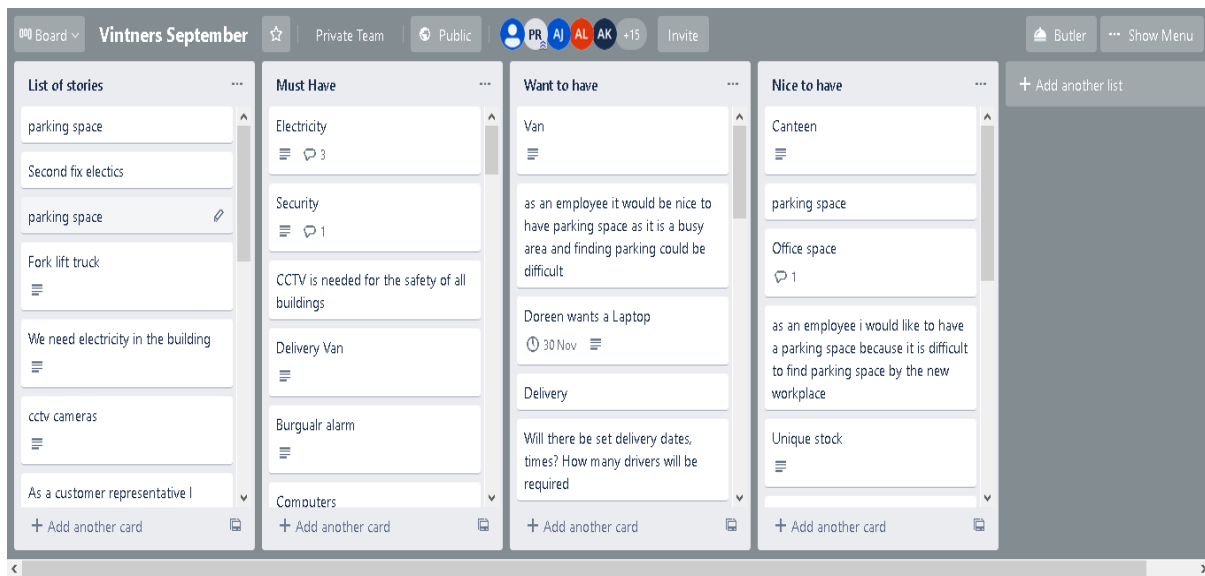


Figure 2 User Stories board of Vintner's Antiques on Trello website Source: Trello.com

### What are User Stories?

User Stories method which is an Agile method of project management will be used in the planning stage of the project. An advantage is that stories create collaboration of teams to think of creative solutions to best serve the user (Atlassian , 2020). The user stories method allows employees to suggest what is required in the new location to set up the family business. It is utilised to define the problem, not the solution. Using the website Trello, it allows user stories to be put on a board similar to a digital white board and requires input from people putting checklist of suggestions or requirements. The stories need to be shown from the user's perspective, suggesting who suggested it and why it is required from project management viewpoint. Using a few sentences, it describes the user story in simple terms about the desired end result.

## Chevron Technique

### CHEVRON SHOWING MISSION, VISION, AND PROBLEM STATEMENT

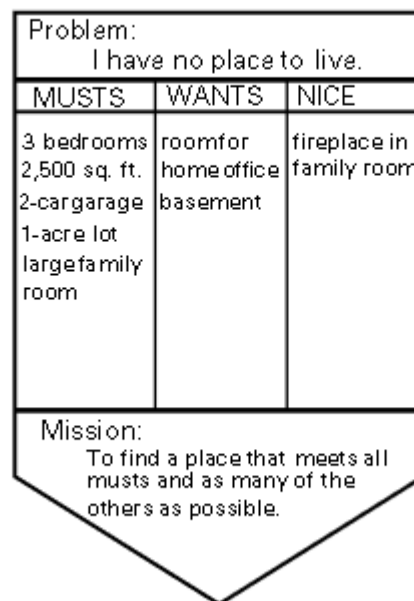


Figure 3 Chevron Technique Source: Heagney 2016

An issue is that people may suggest a lot of items like a list of demands, which may not be absolutely necessary and may be deemed a luxury. For example, people may tend to list fancy equipment, chairs, tables, cars, air conditioning etc. Without proper separation of “must have” items and “nice to have” luxury items it can be overwhelming on the project manager, to meet all demands as well being unable to stay within budget goal of the project. The Chevron technique allows the User Stories to be separated into 3 categories, “Must”, “Want” and “Nice”. (Heagney, 2016) This creates a very clear understanding on project manager for what is a must have essential item or something that is a “nice to have”. To successfully complete a project all the “must haves” must be met, while the “want to haves” and “nice to have” items are optional.

An essential “must have” for the Vintner’s business is gas and electricity and without it most businesses, cannot operate at all. An example of an “want to have” is a break room, while the business can operate without it, it would create a better work environment and may lead to better relationships between employees. In the project some “nice to have” options are parking space, canteens and nice shop front.

Meeting a selected few in the “want to have” and “nice to have” category may instil good will with organisation and be likely to work together again in future, as it can have a positive impact if the project is successful.

## 7.0 Gantt Chart

### Vintners' Antiques Project Planner

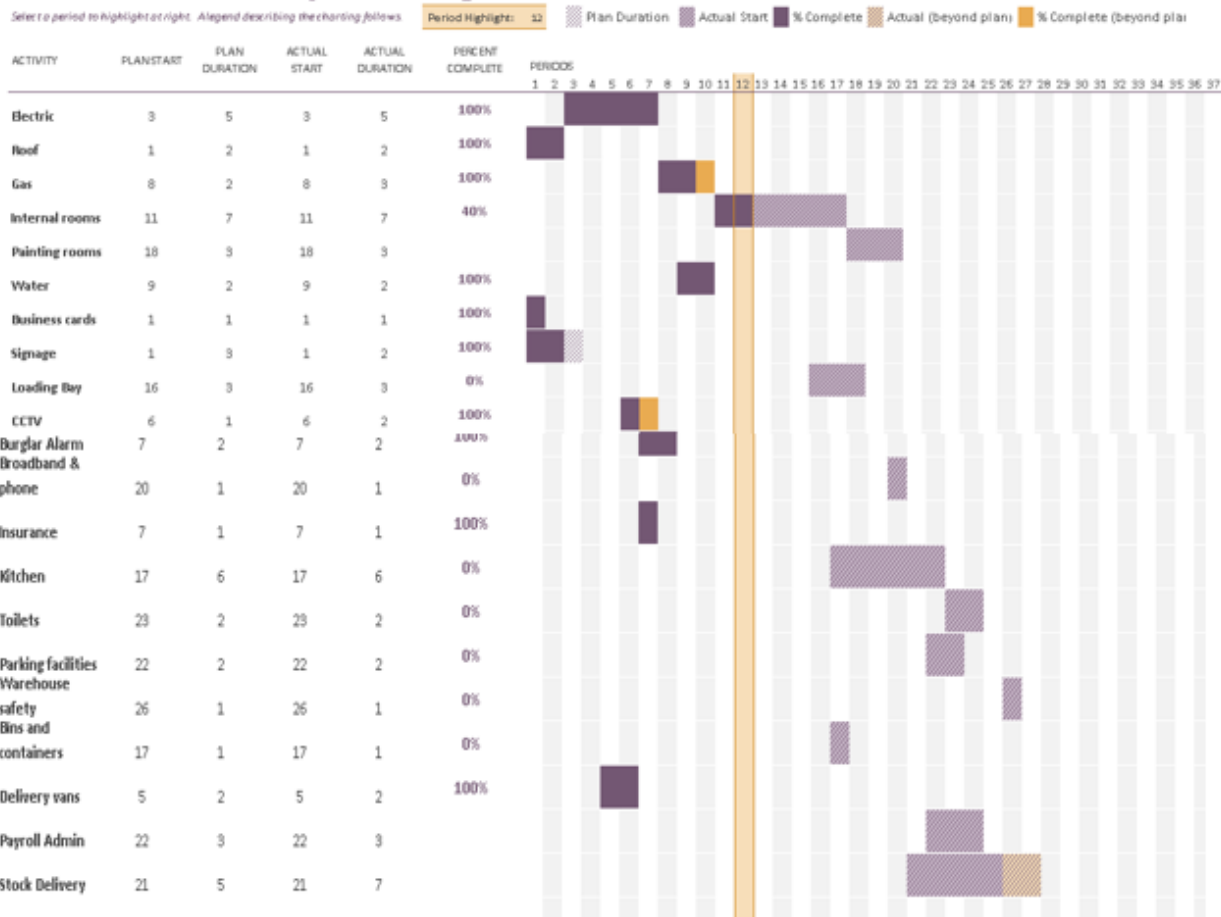


Figure 4 Vintner's project schedule Gantt Chart Source: Author's Own

The Gantt chart is used to track overall projects schedule and is an easy method to create a visual guide which will be useful to sharing with important stakeholders. (Wilson, 2003)

It will show a clear view of the ongoing deadlines of all the tasks included in the project. The user stories that will be implemented are included chart which will outline estimated period required for completion. The progress will be updated on a daily basis to show if the plan is on track for the deadline.

Utilising the chart helps everyone understand how the project has gone so far and also the predicted duration and length of project. The chart shows that the project is expected to finish by day 27 of the project start date if everything goes as planned.

The chart is very useful to understand if some tasks linked with others and without completion, it's not possible to proceed to the next step. For example, fixing the roof was seen as the first priority and without finishing that it wouldn't be safe to start fixing the electricity, without

repairing the roof first due to safety hazards. An example of an independent task is business cards, they can be done whenever the manager chooses as it does not impact any other tasks on the list. A visual representation is shown of how if task deadlines are met or have been delayed. This process also allows creation of estimation of how much the project may cost to completion.

#### **How will the plan be explained to the Vintner family?**

As project manager it will be explained face to face with the project sponsor and steering group. The method chosen will be PowerPoints and which will contain the Gannt charts and user stories to explain the plan and schedule for the project. The hierarchy and project roles will be explained with the Roberts organization chart. The plan will be explained in order to make everyone aware of project risks and downfalls that could potentially happen. The iron triangle can help determine understanding of the overall scope of project.

## 8.0 Conclusion and Recommendation

Many different aspects of what is required when planning for a project were explored. The risks and pitfalls that could occur in the Vintner family project were possible job role conflicts and sibling rivalry. The project should be able to be a success if everything goes as ahead as planned.

As the project manager of the Vintner family project I have applied methods which are familiar to me to make the project a success. I applied the waterfall approach to achieve the project goal. The waterfall technique is great if everything goes perfectly form one phase to another, however it is quite linear and no backtracking to make amendments is possible. The risk of waterfall techniques is quite high as it isn't able to react to any sudden deviations. (IBM Developer, 2019) While I am not a certified project manager there may be certain areas and methods of managing projects, I may lack knowledge and experience in. To progress in future and develop my skills gaining recognised project management certifications in either PRINCE2 or Agile methods can help improve my skills and experience as a project manager.

The screenshot shows the website for South & City College Birmingham. The navigation bar includes links for HOME, COURSES, REDEEM VOUCHER, ABOUT US, CONTACT US, BLOG, and SEARCH. The breadcrumb trail indicates the user is in the 'Agile Project Management Foundation & Practitioner (AgilePM) with Foundation Exam' section. The course title is displayed prominently. Below the title, there are two images: one of a man in a suit pointing at a circular diagram with the word 'AGILE' in the center, surrounded by the words 'CHANGE', 'SCAN', 'ANALYSE', and 'RESPOND'; and another of a hand pressing a blue 'EXAM' key on a keyboard. A blue banner on the left of the keyboard image reads 'AGILE PROJECT MANAGEMENT: FOUNDATION & PRACTITIONER TRAINING WITH FOUNDATION EXAM'. The APMG International AgilePM logo is in the top right corner of the image area. At the bottom, the course price is listed as £350, with buttons for 'ENQUIRE NOW' and 'BUY NOW'.

Figure 5 Agile Course Source: SCB

Enrolling on this course in South Birmingham College based in Birmingham can open up future career opportunities as a certified project manager. The Agile Project management course costs £350 and can be a very worthy investment for getting the right qualifications. The alternative option is getting the full PRINCE2 certification is also noteworthy and will expand

the knowledge I have already gained by studying a module on the subject. Only a fraction of the PRINCE2 method has been explored, though there are various methodologies available such as PMBOK, Scrum and Kanban to enhance my project management capabilities. (PMI, 2020)

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