

PROJECT PLAN FOR THE IMPLEMENTATION OF A FIRST LINE MANAGER

Efficiency Support Toolkit in a Warehouse Environment

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Introduction

Project management is used to organise temporary work that delivers a defined change within agreed limits. Hedeman and Seegers (2009, p. 1) define a project as *“a set of related activities within a temporary organization that is created to deliver, according to agreed conditions, one or more predefined products or services”*. Simon and Murray-Webster (2018, p. 22) add that project management includes *“planning what work needs to be done, when, by whom and to what standards”*. This shows why a structured plan is needed when an organisation wants to introduce improvement.

This assignment presents a fictional warehouse project in which a project manager is asked to support First Line Managers in improving operational efficiency. The chosen project is the implementation of a First Line Manager Efficiency Support Toolkit to strengthen labour planning, shift handovers, productivity tracking and issue escalation. In a warehouse environment, these areas affect daily performance directly, so inconsistent management practices can reduce efficiency. As Kidston and Haward (2015, p. 33) state, *“Effective project management requires effective planning and control”*.

This project plan outlines the aim, objectives and scope of the project, and then identifies the outputs, activities, work breakdown structure, milestones and resource requirements needed for delivery.

Project Aim, Objectives and Scope

The aim of this project is to improve operational efficiency in a warehouse environment by developing and implementing a First Line Manager Efficiency Support Toolkit. The project is intended to help managers deal with daily operational challenges in a more consistent and structured way. This reflects the view that project management is about *“organising and controlling the introduction of the desired change”* (Simon and Murray-Webster, 2018, p. 22).

The objectives are to identify the main efficiency challenges faced by First Line Managers, design a practical toolkit containing productivity trackers, labour planning templates, handover checklists and escalation guidance, pilot the toolkit in one warehouse department, train managers to use it, and review the pilot results to decide whether wider implementation is justified. These objectives are important because *“The project scope statement is the description of the project scope, major deliverables, assumptions, and constraints”* (Project Management Institute, 2013, pp. 81–82), meaning the project must be clearly defined before detailed planning begins.

The scope of the project includes one warehouse site, one selected operational department, toolkit design, manager training, pilot implementation and an initial performance review. It also includes project documentation, feedback collection and a final report. However, it

excludes warehouse redesign, full automation, recruitment of additional permanent staff and replacement of company-wide IT systems. This is important because “*Scope management involves identifying and defining all the elements of the project scope, and for keeping the scope current at all times with a clear definition of what is in scope and what is out*” (Simon and Murray-Webster, 2018, p. 82). Setting these boundaries reduces the risk of uncontrolled change and keeps the project realistic.

Project Outputs / Deliverables

The success of this project depends on producing outputs that directly support First Line Managers in improving daily warehouse efficiency. Simon and Murray-Webster (2018, p. 69) state that “*Outputs: Defined as the tangible or intangible products typically delivered by a project*”, while the Project Management Institute (2013, pp. 287–288) defines a “*Deliverable*” as “*any unique and verifiable product, result, or capability to perform a service that is required to be produced to complete a process, phase, or project*”. This means the project outputs must be practical, measurable and linked to the project aim.

The first deliverable will be a project initiation pack, including the project brief, scope statement, timeline and stakeholder list. The second will be a needs analysis report identifying the main efficiency problems faced by First Line Managers in the selected department. The third and most important deliverable will be the First Line Manager Efficiency Support Toolkit, which will include a daily productivity tracker, labour allocation template, shift handover checklist and issue escalation guide. The fourth deliverable will be training materials for the pilot, and the fifth will be a pilot evaluation and closure report containing results, feedback and recommendations.

These outputs must be agreed early because Hedeman and Seegers (2009, p. 22) state that “*A successful project is output-oriented, not activity-oriented*”. They also explain that “*The set of agreed products defines the scope of a project and provides the basis for planning and control*” (Hedeman and Seegers, 2009, p. 22). In this project, the deliverables provide the structure for implementation and later review.

Activities Required to Deliver the Outputs

After defining the deliverables, the next step is to identify the activities needed to produce them. This is important because the Project Management Institute (2013, pp. 287–288) states that “*Define Activities [is] the process of identifying and documenting the specific actions to be performed to produce the project deliverables*”. In this project, the activities must be directly linked to improving First Line Manager efficiency in the warehouse.

The first activity group is project initiation and definition, including confirming the business problem, agreeing scope, identifying stakeholders and preparing the project plan. Lock (2013) explains that the early stages of project definition should identify the project

requirements, scope and principal tasks before work begins. This is important because the project needs a clear operational focus before the toolkit is created.

The second activity group is current-state analysis, which includes observing existing manager processes, reviewing efficiency data and gathering feedback. According to Wysocki, Kaikini, and Sneed (2014), scoping needs to address the How will you know that you've done it? What will you do? In this instance, before offering a remedy, the project must ascertain the true causes of inefficiency.

The third activity group is toolkit development. This covers the design of templates for labour planning, shift handovers, productivity tracking and issue escalation. Highsmith (2009, p. 56) describes the agile movement from “*Envision*” to “*Speculate*”, which is useful here because the toolkit may need adjustment as the design develops. The final group is training, pilot implementation, monitoring and review. Heagney and Lewis (2022, pp. 26–27) state that “*Unless progress is monitored, you cannot be sure you will succeed*”. Therefore, the pilot must be observed, feedback collected and adjustments made before closure. Together, these activities ensure that the deliverables are not only produced but also tested in practice.

Work Breakdown Structure

A Work Breakdown Structure (WBS) is used to divide the project into manageable sections so that all required work is identified clearly. The Project Management Institute (2013, p. 83) states that “*Create WBS is the process of subdividing project deliverables and project work into smaller, more manageable components*”, while Simon and Murray-Webster (2018, pp. 82–84) explain that “*The work breakdown structure (WBS) is slightly different in that it is a hierarchy that leads to the work that needs to be done to complete the project*”. Heagney and Lewis (2022, pp. 71–72) further state that “The main idea of doing a WBS is to capture all of the tasks”. For this project, the WBS turns the main deliverables into a structured set of activities and tasks.

Work Breakdown Structure for the First Line Manager Efficiency Support Toolkit Project

1. Project initiation
 - 1.1 Define the business problem
 - 1.2 Agree project aim, objectives and scope
 - 1.3 Identify stakeholders
 - 1.4 Prepare project plan
 - 1.5 Gain approval to proceed
2. Current-state analysis
 - 2.1 Observe current warehouse manager processes
 - 2.2 Review existing efficiency data

2.3 Gather feedback from First Line Managers

2.4 Identify major efficiency gaps

2.5 Produce needs analysis report

3. Toolkit design

3.1 Create productivity tracker

3.2 Create labour allocation template

3.3 Create shift handover checklist

3.4 Create issue escalation guide

3.5 Combine documents into toolkit draft

4. Training and pilot preparation

4.1 Develop training materials

4.2 Schedule training session

4.3 Deliver manager training

4.4 Prepare pilot department for launch

5. Pilot implementation and review

5.1 Launch toolkit in pilot area

5.2 Monitor use of toolkit

5.3 Collect feedback and performance data

5.4 Make adjustments if required

5.5 Produce final report and close project

This structure is appropriate because it captures the project scope without becoming too detailed. As Heagney and Lewis (2022, pp. 72–73) explain, “*The WBS should be developed before the schedule*”, because it supports the assignment of resources, estimation of time and control of the work.

Deliverables, Milestones and Timeline

Once the WBS has been developed, the project activities can be linked to deliverables, milestones and timing. Simon and Murray-Webster (2018, pp. 103–104) state that “*Scheduling means planning when activities will be carried out – it is the time-based articulation of the overall project plan*”. Milestones are useful because they show whether the project is progressing as expected. The Project Management Institute (2013, pp. 94–95) defines a milestone as “*a significant point or event in a project*”, while Simon and Murray-Webster (2018, p. 107) explain that milestones “*represent the completion of deliverables or highlight key decision points on the project*”.

The project is expected to last 10 weeks, as shown below:

This sequence is suitable because it creates clear control points and links each stage to a visible output. It also supports logical sequencing, *because “Every activity and milestone except the first and last should be connected to at least one predecessor ... and at least one successor”* (Project Management Institute, 2013, pp. 94–95). As a result, the timeline is realistic, structured and easy to communicate.

Resource Requirements

The final part of the project plan is to consider the resources needed to complete each task. This is important because the project cannot be delivered successfully without the correct people, materials and operational support. Simon and Murray-Webster (2018, pp. 108–109) state that *“In project management terms, resources are the people, equipment, facilities or any other entity that is needed to complete an activity and therefore costs money”*. In this warehouse project, both personnel and material resources must be planned in advance.

The main personnel resources are the project manager, First Line Managers, the warehouse operations manager, an admin or data support person and, if required, a trainer or systems support contact. The project manager will coordinate the work, monitor progress and manage communication. First Line Managers will provide feedback, attend training and test the toolkit during the pilot. The operations manager will act as sponsor and approve key stages. This reflects Kidston and Haward’s (2015, p. 49) point that a responsibility assignment matrix can designate work packages to a team or individual.

The main material resources include laptops, spreadsheet software, warehouse KPI reports, printed handouts, meeting space and shared digital storage. Some tasks may also require access to reporting systems or dashboards. According to the Project Management Institute (2013, pp. 97–98), *“Estimate Activity Resources is the process of estimating the type and quantities of material, human resources, equipment, or supplies required to perform each activity”*. This is relevant because each stage of the project requires different resource types and levels of support.

Resource planning must also consider day-to-day warehouse pressures. Lock (2013) notes that even when a project network is logically correct, tasks may not start at the earliest possible time if too many activities compete for limited resources. This is important in a warehouse setting where managers already work under operational pressure. For that reason, training and the pilot should be scheduled at times that minimise disruption. Careful resource planning will therefore help balance project demands with normal warehouse operations.

Conclusion

In conclusion, this project plan has shown how a structured project management approach can be used to support operational improvement in a warehouse environment. The fictional

project focuses on developing and implementing a First Line Manager Efficiency Support Toolkit to improve labour planning, shift handovers, productivity tracking and issue escalation. This makes the project relevant because it targets practical management problems that can affect daily efficiency.

The plan has defined the project aim, objectives and scope, identified the main deliverables, and broken the work into clear activities and tasks through a Work Breakdown Structure. It has also linked these tasks to milestones, a realistic timeline and the resources needed to complete them. This demonstrates that successful delivery depends not only on identifying what the project should achieve, but also on planning how the work will be organised, controlled and reviewed.

Overall, the project is realistic in scale and suitable for a warehouse setting because it focuses on one department, uses clear scope boundaries and includes a pilot before wider implementation. If delivered successfully, the project could improve management consistency, support better decision-making and create a stronger foundation for future operational improvements.

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