Module Two

Execution of Research Projects and the Available Tools

Training on Project Cycle Management for Researchers
Ethiopian Academy of Sciences
25-27 May 2016, Ghion Hotel, Addis Ababa
Module Objectives

- Develop understanding on execution/implementation of research projects
- Raise capacities in running & managing rigorous research implementation phases & tasks
- Raise abilities for coordinating and keeping the research team together, maintaining project documents and records
- Deepen/intensify understanding of the concept and use of project execution tools
Expected Outcomes

After completing this topic, participants will be able to have:

i. Broadened competencies in executing/implementing projects

ii. Increased capacities for running and managing rigorous research implementation phases & tasks

iii. Increased abilities for coordinating and keeping the research team together, maintaining project documents and records

iv. Deeper understanding of the concept and use of project execution tools
Module Two

- Has two components
  - Research project execution/implementation
  - Project management tools
- This session is devoted to the first component, i.e.
  - Research execution
    - Research execution will be discussed from start to finish and this will address outcomes 1-3
Research Execution has

- Beginning
- Middle part
- Ending

Proposal

Everything after the proposal to reporting and publishing

Report/Publications
Focus of the Research Execution Component

- It deals mainly with matters related to how to execute projects with rigour & efficiency

- Managing research implementation
  - Review the proposal; study work plan (Gantt Chart), see how implementation begins and how it proceeds

- Coordinating & keeping the team together
  - Check resources, information dissemination, visit, research team

- Maintaining project documents and records

- Completing/terminating the project & maintaining effective communication with team members, donors, other stakeholders.
Important Concepts during Project Execution

Leadership

Focus

Tracking

Communication
The Key Role of the Project Manager

--- Leadership

The Project Manager (Project leader, PI) is responsible for making sure that:

- All necessary activities are finished in order & on time
- The project comes within budget
- The project meets quality goals
- The people assigned to the project receive motivation, direction, information, appreciation, reward
- Project is owned by manager and the research team
The Role of the Project Manager/Leader

- The manager must be a versatile and visible researcher

- Project managers should be:
  - Good coaches
  - Proactive, not reactive
  - Adequately planning
  - Good communicators
  - Authoritative (Not Authoritarian), Decisive, Managing by data/facts (Not by uniformed optimism)
  - Able to organize activities from a variety of disciplines
Characteristics/Attributes of a Good Project Manager/Leader

A good project manager should:

● Have working knowledge in several fields
● Be able to understand general managerial problems - should be a leader & a manager
● Have capability to work under pressure
● Be goal-oriented, innovator, Versatilist
● Be able to deal with stress, chaos, ambiguity
● Have active interest in training and developing subordinates
More Characteristics/Attributes of a Good Project Manager

A good project manager should:

- Be able to delegate some tasks to subordinates
- Know the project and understand its objectives
- Know the systematic process for managing projects
- Be able to answer the following questions:

<table>
<thead>
<tr>
<th>What is the project for?</th>
<th>Why is it required?</th>
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<tbody>
<tr>
<td>Whom does it serve?</td>
<td>How is it justified?</td>
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<tr>
<td>How is it going to be used?</td>
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</table>
Ethical Issues: Bad Practices in Project Execution

- Bid **rigging** – divulging confidential information to give some bidders an unfair advantage
- “**Low balling**” contractors – try to “buy” the project by bidding low hopping to renegotiate
- Bribery – particularly on international projects
- Expense account **stuffing**
- Use of substandard materials
- Compromising health and safety standards
- Withholding needed information
- Failure to admit project failure at close

- Keeping away from these and other unethical practices
Management of Projects at Execution Time

**Project Management Functions**
- Scoping
- **Planning**
- Estimating
- **Scheduling**
- Organizing
- Directing
- **Controlling**
- Closing

- **Planning:** Goal setting, defining the project, team organization
- **Scheduling:** Relates people, funds and supplies to specific activities, and activities to each other
- **Controlling:** Monitors resources, costs, quality and budgets; revises plans and shifts resources to meet time and cost demands

Best done in a joint project planning (JPP) workshop
Project Management can Broadly be Understood as:

- The application of knowledge, skills, tools and techniques to project activities in order to meet project requirements

- Management of every detail of a project - process of planning and directing a project from inception to its final completion

- Here it refers to the management of the project execution/implementation phase
Project Management Activities in the Implementation Phase

- Planning
  - Objectives
  - Resources
  - Work breakdown
  - Organization

- Scheduling
  - Project activities
  - Start and end times
  - Network

- Controlling
  - Monitor, compare, revise, action, updating
Research Project Execution:

A major step in project management/project cycle

Depicting PROJECT EXECUTION in the Project Cycle as given in two manuals

Manual 1

Manual 2
When Planning ends, Execution begins.
What is **Project Execution or Project Implementation**?

The process whereby:

- **Project inputs** are converted to **project outputs**
- The tasks that build the deliverables are executed

The Project Execution Phase

- Begins when the project plan is approved and the resources necessary for executing the starting task are assembled

Project execution should be in accordance with the approved project plan
Project Execution

• Putting in **action** the **activities of the project**
• Putting into **practice what was proposed** in the project document
  • Transforming **the project proposal** into the actual project
  • Generating the deliverables of the project
  • **Management of the project or executing the project intentions**
N.B.: The Research Proposal has the Plan Showing the:

- Research design
- Materials and Methods
- Research protocol/procedure
- Expected outcome/significance
- Benefits/beneficiaries/applications
- Work plan/time frames
- Budget breakdown & more
- Activities/tasks with time in Gantt Chart

Execution or implementation involves putting these into action in a successful manner.
Completion of Research Proposal Preparation and Securing Approval and Funding Marks the Beginning of Research Execution

- The project plan, the goal and the way to reach it become clear from the proposal.
- The next step is to execute the research by implementing it as planned = execution, research engagement.
What is actually done in research execution?

- Organize the research team, orient, share relevant information, allocate resources (human, financial, material)
- Apply the methods, collect and analyze the data
  - summarizing, tabulating, producing figures, tables, narratives
- Draw conclusions in line with the objectives and the hypotheses
- Discuss the findings by relating them with earlier studies and projecting to the future
  - Engagement in the actual research work – implementing it
Who Implements the Project?

● Usually the implementing agency (organization) that prepared the project and received funding

● Co-operating agencies
  ● Organizations that participate in the implementation of the project:
    ● Collaborators, advisors, organizations who provide staff on secondment basis

● The team that proposed the research project and received funding

● The researcher who wrote the proposal and got the research grant
What a Researcher does after Preparing a Proposal and Securing Approval/Funding

● Engages in doing the research

● Where would one start?
  ● Study the proposal work plan (Gantt Chart)
  ● Identify overlapping activities
  ● Carry out the activities as indicated
  ● Modify the plan and show in a Gantt Chart with more details; showing who does what
  ● Prepare project implementation schedule
The Project Implementation Schedule

Concerned with clarification of:

● What activities can produce expected project outcomes?
● What is the sequence of these activities?
● What is the time frame for these activities?
● Who will be responsible for carrying out each activity?
Project Management Techniques Applicable to the in Execution Phase

For Scheduling

On the Gantt Chart:

• The parts or implementation phases of the project and the sequence in which the associated activities shall be carried out are indicated
• The amount of time required for each activity is estimated
• The list of activities that:
  • Can be carried out at the same time are indicated
  • Have to be carried out in sequence are shown

Gantt Chart (Progress chart)
Critical Path Method (CPM)
Programme Evaluation & Review Technique (PERT)
Simple Formats
What is a Gantt Chart?

• One of the most popular and useful ways of showing activities (tasks or events) displayed against time

• Commonly used in project proposals and management plans
  
  • On the left of the chart is a list of the activities and along the top is a suitable time scale (year, month, week, days)
  
  • Each activity is represented by a bar; position and length of bar reflects the start date, duration & end date of the activity

• **Gantt chart is an** icon of good planning and good project
The Gantt Chart

- Allows to see at a glance:
  - What the various activities/tasks are
  - Where each activity begins and ends
  - How long each activity is scheduled to last
  - Where an activity overlaps with other activities, and by how much
  - The start, progress and end date of the whole project; timeline for completion and by whom?

**Importantly**, a Gantt Chart shows what has to be done (activities) and when (schedule)
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<td>Proposal Writing and Literature Review</td>
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<td>Submission of First Thesis Draft</td>
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<td>Preparing Scientific Manuscript(s) for Possible Publication</td>
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**Sample Gantt Chart from MSc Thesis Proposal for one year**

Made during proposal preparation, the researcher follows it at implementation phase
If not included in the proposal, it has to be done at the implementation stage
<table>
<thead>
<tr>
<th>Activity</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
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<tbody>
<tr>
<td>Literature Search (confirm gap)</td>
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<tr>
<td>Draft Research Question/Topic</td>
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<tr>
<td>Scope out research (initial thesis plan)</td>
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<td>Draft Bibliography</td>
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<tr>
<td>Reading (2ndary lit)</td>
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<tr>
<td>Draft Literature Review (define gap and contexts)</td>
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<td>Feedback on Literature Review</td>
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<td>Complete Literature Review</td>
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<tr>
<td>Conduct Research</td>
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<td>Draft Initial Chapters</td>
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<td>Feedback on initial Chapters</td>
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<tr>
<td>Draft Introduction (detailed thesis plan/research question)</td>
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<tr>
<td>Feedback on Introduction</td>
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<td>Draft Middle Chapters</td>
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<td>Feedback on Middle Chapters</td>
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<td>Draft final Chapters</td>
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<td>Feedback on remaining chapters</td>
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<td>Complete all Chapters</td>
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<td>Complete Introduction</td>
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<td>Draft Conclusion</td>
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<td>Feedback on Conclusion</td>
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<td>Complete Conclusion</td>
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<td>Complete Bibliography</td>
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<td>Write abstract / acknowledgements / index</td>
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<td>Proofreading</td>
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<td>Printing &amp; Binding</td>
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<td>Submission</td>
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</table>

Sample

With detailed activities for a three year project
<table>
<thead>
<tr>
<th>Activity</th>
<th>Starting Date</th>
<th>Ending Date</th>
<th>Cost</th>
<th>Responsible Person</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparing Seed Bed</td>
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<td>Planting</td>
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<td>Weeding</td>
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<td>Harvesting</td>
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<td>Storage</td>
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<td>Threshing</td>
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<td>Marketing</td>
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Develop Project Implementation Plan (PIP)

PIP involves:
● Project activation
● Project operation

Project activation

● If PIP was not carried out during the project design process, it is carried out at the project activation stage
  ● Making arrangements to have the project started
    ● Usually done during the inception meeting of the project
    ● Involves coordination & allocation of resources to operationalize

Project operation

● This is the practical management of a project
  ● Project inputs are transformed into outputs to achieve immediate project objectives.
Approaches to Project Implementation

Top-down approach
- Implementation mainly done by agencies from outside the community with limited involvement of beneficiaries

Bottom-up approach
- Beneficiaries implement the project
- Outside agencies may provide the financial resources and technical assistance

Collaborative participatory approach
- Both top-down and bottom-up approaches to project implementation are applied in the process
Mobilizing the Study Team, Clarifying Roles and Responsibilities, Lines of Authority and Decision Making; Reviewing the Work Plan Collectively

1. Setting goals for the team with time frames and expectations
2. Determining the membership of the team
3. Developing staffing procedures (recruiting, training, organizing the team)
4. Identifying needs for resources and integrating with the team (training, materials, supplies)
5. Assigning leadership roles in the team
6. Defining a mechanism for clear and consistent communications, procedure for decision making and problem solving among team members
7. Planning team building activities early
8. Planning the first team meeting, contacting each member
... Mobilizing...

1. Set Clear Goals for the Team, Including Time Frames and Expectations

- Design SMART Goals: Specific, Measurable, Achievable, Relevant, Time-bound
- Decide on expertise needed to achieve the goals and time for recruiting or filling vacant positions
- Research manager divides roles and responsibility for the research team (expectations from an enumerator, a field supervisor and project team leader)
2. Determine Membership of the Team

- Usually (ideally) done at the time of proposal development
- Manager ensures that:
  - Sufficient number of team members of desired expertise are included
    - Diversity of values, perspectives, persons with good human relations to ensure robust ideas and discussion with good human relations and skills
  - Team members have full understanding of the project
  - A statistician is included to advise on the technical aspects of research
  - Team members are available with time commitment throughout project life
  - There is a good gender balance in the team
3. Develop Staffing Procedures (Recruiting, Training and Organizing the Team)

- Transparent announcement in selection of project staff
- Managers should explain the project requirements thoroughly to the team and motivate every member
- Team members should understand the team’s objectives, their roles in the team, their next steps and where to get help
... Mobilizing...

4. Identifying Needs for Resources for Integrating with Team (Training, Materials, Supplies)

- The project manager identifies the necessary orientation and preparation activities for the team members

5. Planning Team Building Activities Early

6. The first meeting of the team is critical to the project start-up
Additional Collection & Review of Literature

A Thorough and Critical Literature Review:

● Provides a discussion of the literature related to the project

● Provides the focus for the study
  ● Indicates how the research has been designed
  ● Identifies gaps showing what is new in the research
  ● Enhances the justification of the research topic
  ● Distinguishes what is being done in the study from what has already been done by others
A Thorough and Critical Literature Review:
Serves four main additional purposes

• Demonstrates the underlying assumptions behind the general research questions
• Demonstrates that the researcher is knowledgeable about related research and the intellectual traditions that surround and support the study
• Shows that the researcher has identified some gaps in previous research and that the proposed study will address realistic needs
• Refines and redefines the research questions
  – Leads to new ideas
  – Helps to define the conceptual framework of the study
  – May entail redesigning of the study as the research progresses
A Thorough and Critical Literature Review:

- Provides the justification for the research methodology
- Supports the research during the data collection and throughout the writing of the research
- Allows researchers to learn continuously and enrich their conceptual framework and the quality of their data
  - May lead to revision of weak conceptual frameworks
  - May further lead to revision of weak research designs and the data collection instruments to ensure quality data
  - Confirm or validate the findings arising during project implementation
Managing Sample Selection, Data Collection Instruments

Managing the field implementation challenges

- Collect data according to agreed sampling, sample size, protocol
  - Complete data collection according to agreed quality standards
  - Cover the agreed geographical areas in the sample plan
  - Cover types & quotas of respondents/groups in the sample plan
  - Complete the field research sample on schedule
  - Complete the field research sample on budget
- Manage the team to achieve the above tasks
- Communicate progress/problems to management & sponsors
- Solve problems together with the team, management & sponsors

➢ Among the big problems:
  ➢ Managing well in relation to sample collection problems
  ➢ Data collection by enumerators requires tailored training
Training of Data Enumerators

(In some projects, data numerators are deployed)

- Essential materials needed during training and in the actual work
- Contents of the training package
- Developing enumerator personal qualities/traits
  - Competence, professionalism, and commitment
  - Understanding the technical aspects or content areas (subjects) so that enumerators fully grasp the objectives and be familiar with the data collection instruments
Contents of Training of Data Enumerators

● Background information on the research, why it is conducted; its importance and use
● Information on the job, responsibility, place in the research, relations with the respondents or research participants
● Confidentiality of information collected, objectives and nature of the survey
● How the research is organized, when sampling is being used, how the sample is selected, imparting essential skills
● Knowing the do’s and don’ts
# The Do’s and Don’ts of Enumerators/Interviewers

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<tr>
<th>DO’S</th>
<th>DON’TS</th>
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<tr>
<td>• Read every question exactly as written</td>
<td>• Do not improvise/improve</td>
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<td>• Read the questions slowly enough so that respondents can understand</td>
<td>• Do not act embarrassed about a respondent’s answers to sensitive questions</td>
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<td>• Wait for the respondent to answer</td>
<td>• Never suggest an answer</td>
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<td>• If the respondent cannot answer, repeat the question</td>
<td>• Don’t repeat the respondent’s answers</td>
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<td>• Remain absolutely neutral about the respondent’s answers</td>
<td>• Do not give advice to respondents on personal matters</td>
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<td>• Conduct the interview in private</td>
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<td>• Answer directly any questions the respondent may have about the purpose of the survey</td>
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<tr>
<td>• Listen carefully to the respondent’s answer</td>
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The Project Control Process

Gantt Chart Again for the Tracking and Control

● Control
  ● The process of comparing actual performance against plan to identify deviations, evaluate courses of action, and take appropriate corrective measures

● Project Control Steps
  ● Setting a baseline plan
  ● Measuring progress and performance
  ● Comparing plan against actual implementation
  ● Taking action
    ● Tracking on the Gantt charts
    ● Using control charts
What is a baseline?

• It is an anchor point for measuring performance against plan
  • Planned cost
  • Planned schedule
  • Planned scope

• It makes the plan difficult to change
  • It is like writing the plan on an everlasting plate

➢ The Gantt charts (next two slides) show the baseline, work accomplished, work remaining
Baseline and Tracking Gantt Charts

Baseline Gantt Chart

Tracking Gantt Chart Showing Status—through Period 6
Data Processing, Editing, Encoding, Cleaning

- Entry of a complete and clean raw data set involves:
  - Setting up and managing the data entry team, putting in place the processes and tools (mainly electronic) that the study team will use to capture raw data accurately and completely
  - Designing and setting up the data entry system
Data Processing, Editing, Encoding, Cleaning

● Managing - Managing data entry progress, quality and schedule
  ● Who will do data entry? Who will supervise it?
  ● What skills do they need? How many people?
  ● Who will train the data entry team and when and how?
  ● How will the team ensure complete and good quality data entry?
  ● How much will the data entry team cost?
  ● When should it start? How many days will it take?
  ● How can it work best with field teams, data analysis teams & management?
  ● What computer software or program to use?

● Organizing pre-data entry tasks, coding, etc.
● Cleaning the raw data
Data Analysis (Descriptive, Inferential), Data Summaries

● Conducting descriptive and inferential data analysis
  ● Preparing the data summaries
  ● Checking the database
  ● Checking the data tables

● Further analysis:
  ● Examine the research questions:
    ● See if:
      ● More independent/dependent variables are needed
      ● Different statistical tests are needed
      ● The analysis of the data need more rigour
Coordinating activities, tasks, teams

- Research project coordination tasks and issues
- Building the research team
- The research project Manager as a facilitator
Measure of Project Success

- The resulting system is acceptable to the customer
- The system was delivered on time
- The system was delivered within budget
- Simplicity of Design, Careful preparation
- Good management, Political Commitment
- Involvement of beneficiaries/community
Causes of Project Failure

- Lack of organization’s commitment
- Taking shortcuts in methodology
- Poor management
- Premature commitment to a fixed budget and schedule
- Poor estimating techniques
- Over-optimism
- Inadequate people management skills
- Insufficient resources (financial, human, technical)
- Failure to “manage to the plan”
- Technical problems
- Failure to establish upper-management commitment to the project
Typical Project Implementation Problems

- Poor scheduling of projects leading to delays in implementation and completion
- Problems of fund allocation
- Delay and sometimes lack of counterpart funding
- Lack of accountability and transparency
- Bureaucracy in decision-making
- Weak monitoring systems
- Natural calamities like drought, earthquakes, landslides, and hailstorms.
- Policy changes
- Migration of beneficiaries
- Lack of team work
- Lack of incentives for implementers
- Selfishness/nepotism/favoritism by some project managers
Problems Associated with Project Execution Planning

- Inadequate execution plan leads to frustration towards the end of the project leading to poor project performance

- Adequate execution plan leads to the correct completion of work

Project Start

Mr X

Project End

Mr Y
Checking and Confirming Completion of Project

• Ensure the proposed project components have been completed and they are accurate

• Ensure any outstanding actions or issues are addressed

• Discuss with project personnel to ensure all deliverables have been produced and that they are up to standard and quality

• Hold a formal Post Project Review
Tracking Project Progress in Five Steps

First • Get the Project Fully Defined

Second • Get Stakeholder Buy-in

Third • Time to “Size” the Work Efforts

Fourth • Track and Oversee the Project

Fifth • Wrap Things Up with a Full Review

(Reasons and Details on the Sample slide next page)
Step-by-Step to Fast Tracked Projects

1. First, get the project fully defined.
   Goals, Objectives, Requirements, Scope.
   Why? You can’t deliver a project when you don’t know exactly what is expected and what is possible.
   How? Using the (16) key project definition criteria supplied by the fast track process.
   Result: An actionable specification of project needs and capabilities.

2. Then, you need to get stakeholder buy-in.
   Priorities, Trade-offs, Adjustments.
   Why? Buy-in gets everyone on the same page, minimizes conflict and sets realistic expectations.
   How? Using the standardized Negotiation Framework supplied by the fast track process.
   Result: Consensus for a prioritized project scope and strategy.

3. Then, it’s time to "size" the work effort.
   Resources, Scheduling, Management.
   Why? Sizing lets you streamline the project management work effort to save time and optimize project team capabilities.
   How? Using the "sizing" guidelines supplied by the fast track process.
   Result: Project-specific management practices sized for time-saving value and efficiency.

4. Then, it’s time to track and oversee.
   Changes, Issues, Risks and Status.
   Why? To ensure that unexpected events do not derail all the hard work performed to this point.
   How? Applying the oversight practices supplied by the fast track process.
   Result: A successfully completed project (on time, plan and budget).

5. And then wrap things up with a full review.
   Project Results, Project Performance.
   Why? Project reviews are essential to ensure "continuous improvement" for the future.
   How? Applying the project review standards and practices supplied by the fast track process.
   Result: Usable and actionable project "lessons learned".

"Rinse and Repeat"

The project may end, but the experience lives on. That's the value of the project review and the lesson learned. With each project, fast tracking capabilities improve and so do the results.
Finishing with Report Preparation and Submission

- The completion project implementation marks the beginning of a full compilation of the research report
- The chain of activities that started when execution began with planning continues to scheduling, then to controlling and culminates in report preparation upon project completion
Project Execution
(Planning, Scheduling and Controlling)

Planning the Project
- Time
  - Performance
  - Set the goals
- Cost
  - Define the project
- Develop work breakdown schedule
- Identify team/resources

Scheduling the Project
- Sequence activities
  - 1.7
  - 1.2
  - 2.0
  - 2.1
  - 2.11
- Schedule deliverables
- Schedule resources
- Assign people
  - Adams
  - Smith
  - Jones

Controlling the Project
- Revise and change plans
- Monitor resources, costs, quality
- Shift resources

Before project

Start of project Timeline

During project