

## *Development Suggestions for Managing the Workload*

### Suggested Readings

<b>Title</b>	<b>Author/Publisher</b>	<b>Learning Mode</b>
The Project Manager's Partner: A Step-by-Step Guide to Project Management (2nd edition)	Greer, Michael / 1996 / HRD Press	Book

### Development Activities

1. Develop a work breakdown structure (WBS). Include the following areas:
  - The tasks required to complete the project
  - The level of effort required to complete these tasks
  - The skill sets and numbers of resources you need to carry out this project successfully
  - A reasonable schedule for completing the tasks.
2. Mobilize the resources necessary to achieve the goals set forth by the team. Once you have identified the resource skills and numbers needed, you often have to negotiate for them. This requires that you have a clear understanding of exactly whom you want for your team. This is especially critical if it is a cross-functional team. It is important to establish the level of competency you need with the functional manager with whom you are negotiating. He or she is then more likely to provide you with someone with equivalent or better skills even if you don't get the particular person you want.

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3. Use the following questions to help you analyze the team according to each member's strengths and weaknesses:
  - a. Considering the skill sets needed to successfully complete the project, what are each member's strengths and weaknesses and how can I leverage their strengths?
  - b. Which team members can serve with their technical expertise and also as mentors to other team members?
  - c. Which team members need close supervision?
  - d. Which team members can serve as "leads" and help supervise the weaker team members?
  - e. To whom can I delegate some of the task and supervisory responsibilities?
  
4. Estimate a reasonable schedule. Once the resources are identified, the schedule can be determined. The best way to develop the schedule is to:
  - Ask the task lead to estimate the schedule with known resources. (If there is some doubt about the resource commitment, then an average time may be determined by estimating the best case and worst case scenarios.)
  - Put together the best schedule estimate possible with the data available.
  - If there is ANY doubt about the schedule, put some reserve or contingency into the schedule itself.
  - Use the schedule, and the resources involved, to develop the budget.
  
5. Estimate a reasonable budget, taking into consideration the following factors:
  - a. Once the required resources are identified and assigned, the budget can be developed against the schedule.
  - b. Basically, budget is estimated by multiplying time needed by labor rate. But it is a good idea to establish a relationship with a financial expert in the organization to ensure you are complying with the organization's practices and procedures.
  - c. Always include a contingency reserve in the budget. Make sure you understand the customer's and your organization's policies about contingency. Usually, contingency has to be identified as such and some customers will not accept a contingency fund.

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6. Develop a project plan. Consider the following components of a typical project plan when developing your own plan:
  - Executive summary
  - Statement of the scope of the project
  - Project and product requirements
  - Special contractual requirements
  - Resource requirements
  - Special requirements such as consultants or teaming with another organization
  - Schedules
  - Budget
  - Risk issues
  - Quality measurements (measurement checkpoints to determine whether the product is being developed according to the customer's requirements)
  - Appendices
    - Specifications provided
    - Communication plan
    - Stakeholder management plan
    - Detailed schedules
    - Risk plan
    - Quality plan
    - Logistics plan (used when there is a follow-on maintenance requirement).
7. Develop a systematic and timely tracking system to follow project progress, i.e., schedule and budget, against the plan and as it impacts the organization's strategic goals. To help you do this, consider the following suggestions:
  - Learn your organization's system for tracking a project's progress against its plan.
  - Establish your project's tracking system to mirror the organization's system.
  - Develop and circulate reports that accurately describe your project's progress.
8. Conduct a stakeholder analysis at the beginning of every project.
  - a. Determine who is for and against the project and why.
  - b. Develop a strategy to move stakeholders to either a neutral or a positive position relative to their view of the project. (Don't allow a stakeholder to have a completely negative view of the project's importance to the organization.)
  - c. Keep all stakeholders informed on the project's progress.

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9. Develop and insist on a “lessons learned” process. Use the following steps:
  - a. After every project, the lessons learned should be recorded.
  - b. Record what worked and what went wrong.
  - c. Record the financials in particular so that future estimating exercises can be improved.
  - d. Archive the lessons learned so that everyone in the organization can benefit from the trials and successes of your project.

### Tips

1. Meet with those on your team who have resource needs in order to understand their budget requests.
2. Use the development of the budget as an opportunity for constructive communication, debate, and coordination with others on your project team.
3. Develop a systematic and timely tracking system to follow project budgets and schedules.
4. Build lead time into project plans to accommodate the procurement process.
5. Try “management by walking around” by getting out into the work area and seeing what is going on. This will help you stay in touch with what is happening in your project team through frequent informal chats.
6. Monitor resources to be sure they are being used effectively and efficiently.
7. Display a large calendar showing all projects that are in progress.
8. Provide positive and constructive feedback on a timely basis to subordinates involved in your projects. Solicit their input to understand their perceptions of critical outcome and process measures of their organizational contributions.
9. Regularly and systematically monitor progress, change, and performance as they take place, not after the fact.
10. View planning, controlling, and evaluation and feedback as a continuous cycle.
11. Develop standards for each responsibility assigned. Decide how much deviation from standards will be acceptable.
12. If performance deviates from expected results, problem-solve with relevant groups (employees, peers, and managers) to identify and correct root causes.

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13. At the start of a project, schedule ongoing meetings with employees as individuals or as a group to update progress toward project goals.
14. Participate with peers, managers, and employees in reviews of your own team and other organizational teams.
15. Examine projects that have been successfully completed to identify the factors that account for their success.
16. If things are not going according to plan, analyze the root causes, attempt to correct them, and evaluate whether revisions are necessary to the team's goals and plans.
17. Understand your organization's strategic goals and how your project(s) support those goals. Consider the following questions:
  - When this project was selected, what strategic objectives were used in the selection criteria?
  - What organizational goals is this project expected to support or enhance?
18. Consider the following questions to analyze project requirements:
  - What exactly is needed?
  - Are the requirements clear and can they be described in writing?
  - Are the customer's product expectations achievable?
  - Have "completion criteria" been established? (That is, have the measures been defined that will be used to determine when the project is complete and acceptable?)