Project Management for Administrative Professionals Case Study

The HR department has decided to survey its internal customers and Jean's manager, VP of HR, Mark, has assigned her to implement this customer satisfaction survey. The gap between what the HR needs and the current situation is that no surveys have been done for five years. HR realized it needed this important information to improve customer service and to prevent a plan to outsource many HR functions. Jean defined the problem with this ***Problem Statement: We must identify the customers' current satisfaction with our services and identify their future expectations.***

Jean's survey project begins as she begins to plan for the survey and ends when the final report has been submitted to her manager. This report will include a process definition for conducting the survey as an annual event.

Jean has never done a customer survey before and never managed a project. She's not sure what's involved in the survey project but Mark, told her she will be doing the survey annually as part of her regular duties as Administrative Assistant to the HR VP. When she conducts the survey in the future it will no longer be a Project, but an activity that will follow the procedure she develops during this first survey project.

Project Charter

Project: Customer Satisfaction Survey   **Priority:** #1
Project Manager: Jean

Problem Statement: *We must identify the customers' current satisfaction with our services and identify their future expectations.*

Project Objectives:
- Complete survey project plan by May 15, including the detailed tasks, people assigned, measurements and budget
- Conduct pilot survey with 20 top customers, defined by VP, by August 15
- Complete full survey by October 15
- Present survey analysis to all HR executives, managers and PMs by Nov. 15
- Roll out annual survey procedure for the annual survey by December 15

Project Completion Date: November 15

Major Milestones:	Dates:
Survey Plan Complete	May 15
Survey Pilot Complete	August 15
Survey Complete	October15
Survey Results Presentation	November 15
Survey Procedure Installed	December 15

People:	Contact Information:
Mark, VP	mm@company.com X 365
Alice, Accounting	aa@company.com X 432
Juan, Chief Business Analyst	jj@company.com X 897
Sam, Marketing & Sales	ss@company.com X 765

Requirements: (for survey)

- The annual survey will document customer satisfaction on current services
- The annual survey will document customer expectations for future services
- The annual survey process will be completely documented
- The pilot survey will use the top 20 customers as determined by the VP
- The annual survey will use the standard survey techniques defined in Document 4536
- The data analysis will use the standard techniques defined in Document 6524
- The final report format will follow Reporting Standard FR-354

Important private information developed by Jean:

1. **Anticipated problems:**
   - Alice, Juan and Sam work in other departments; don't see this project as a priority; don't see themselves as being part of a project team
   - Although Juan knows he has been assigned to do the data analysis, he assigned to a big company-wide project and is reluctant to spend too much time on this project
   - Mark travels extensively and doesn't answer questions quickly
   - Those who conducted survey five years ago, are no longer at company
   - Since several departments will have input they may not be able to agree on content for the survey quickly
   - Rumors of a major acquisition could affect the budget
   - As Administrative Assistant to HR VP, I (Jean) have several major assignments and my ongoing work. I don't know how I'll get it all done.

2. **Anticipated opportunities:**
   - I'll be working closely with Sam in Marketing and I want to know more about opportunities there
   - This will give me a chance to use the skills I learned in a seminar on market research
   - This will give me visibility with upper management
   - Interviewing our major customers will give me an opportunity to network with important people
   - Interviewing the customers will help me understand the business better
   - Alice is quite knowledgeable about how our business operates financially and I'd like to understand that better.

3. **What are the desired results of the Project and who will use or benefit from them? Who will resist?**
Mark believes customer information will create new incentives for customer service and help HR understand customers better. He thinks most departments will see big benefits.

4. **What is the Project scope? What should be included/excluded?**
The initial Survey will not include more than 20 questions so the interviews can be conducted quickly. There will be no focus groups at this time. The Survey will emphasize the importance of each current and future service. It will de-emphasize satisfaction in favor of expectations.

5. **What is the budget? What are the accounting codes to be used? How will it be tracked?**
The budget will be $150,000, including travel expenses for Juan to visit the top internal customers in North America, Asia, and Europe to conduct more in depth interviews face to face. All items will be charged to A-876009 and tracked with our standard PM accounting link.

6. **What are my areas of authority? When must I ask permission or confirm decisions?**
As long as I am not exceeding the detailed budget by more than 2%, I can make decisions. Before sending out any communication to the internal customers, it must be reviewed by Mark and Juan. Alice, Juan, and Sam have been informed they should cooperate with me fully. If I run into a problem, Mark will step in. Mark and the COO must approve the final plan.

7. **Status reporting: Frequency, Format, Content, Distribution**
A quick report using *PMSoftReport* should be distributed electronically to Mark, Alice, Juan, and Sam biweekly, by 4 pm Thursday, including actual results and any missed-target explanations.

8. **Stakeholders and their concerns:**
   - **Mark** – biggest concern is conducting an excellent survey, with no mistakes, satisfying the COO and the internal customers that surveys can be done in house.
   - **Alice** – wants to stay within budget and assure we account for and justify every expenditure
   - **Juan** – wants to improve HR relationship with internal customers because of the increasing competition from outsourcing vendors he feels threaten his Business Analysis department
   - **Sam** – not sure why he's on this project. External market research is important to him. He is not convinced that an in-house survey will produce the same level results as externally performed professional ones. He'll provide some guidance if it doesn't require much time.
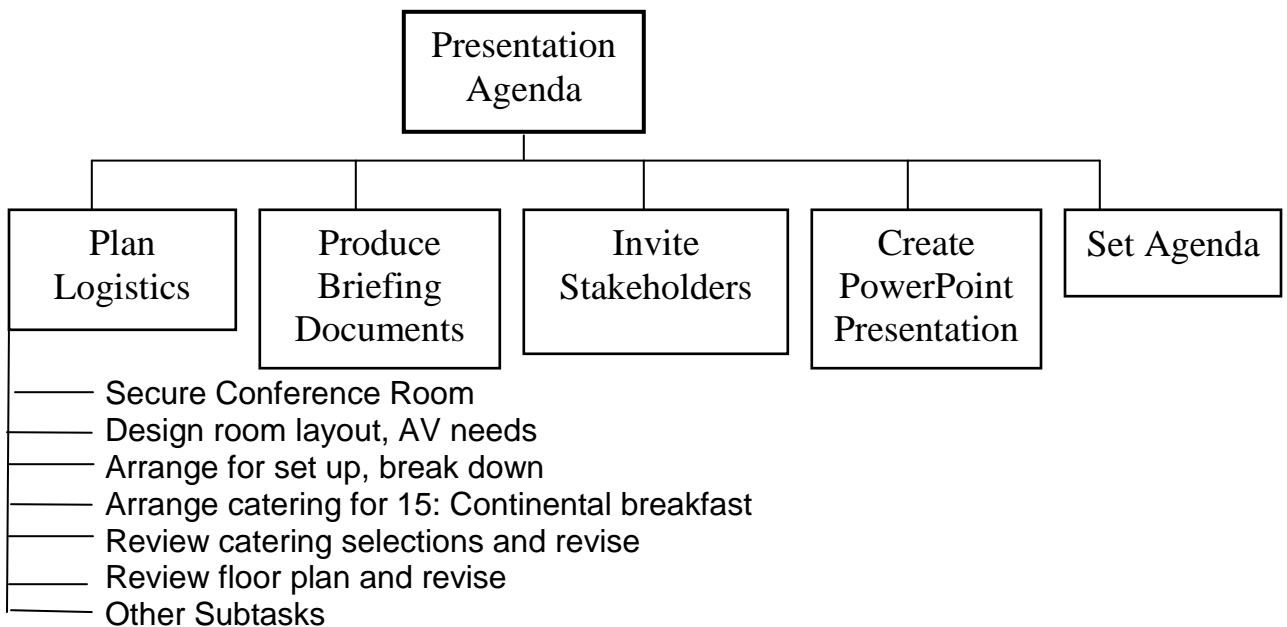
Work Breakdown Structure (WBS)

WBS visualizes all individual tasks to be performed. Organize Tasks by larger activity categories. In planning the survey, the main activities are those related to the major objectives of the Project. Jean adds an Activity to develop the Agenda for the presentation meeting. Although the various managers will do actual work, coordinating their efforts will fall to Jean, the Project Manager.

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                        ┌─────────────────┐
                        │    Customer     │
                        │ Survey Project  │
                        │    (Survey)     │
                        └─────────────────┘
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Requirements	Survey Design	Survey Pilot	Full Customer Survey	Survey Results	Presentation Agenda
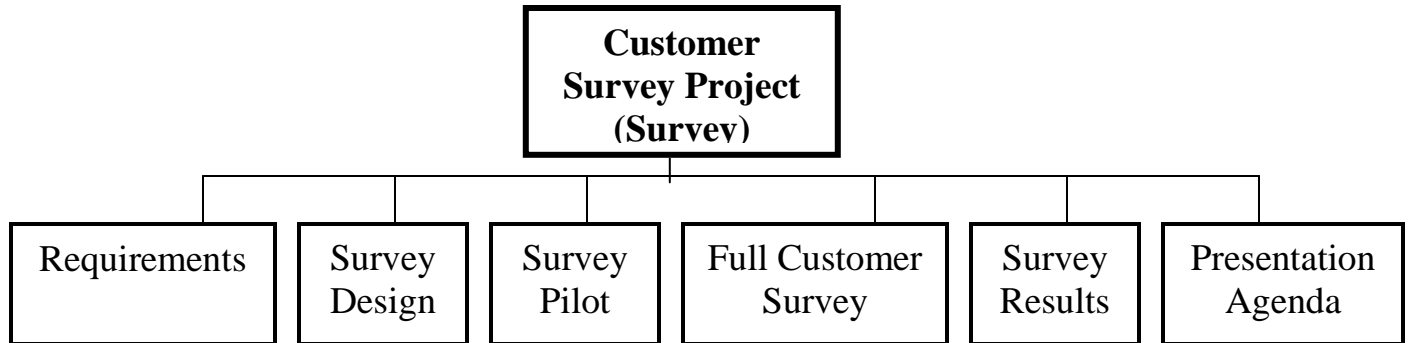
Once major activities are defined, the PM decides on the Tasks that need to be accomplished for each major Activity. Each Task may be broken down into smaller Subtasks. The number of layers depends on: size, complexity of Project, level of needed detail to guide you through the work, and level of experience and skill of person assigned to each task. (The art of Project Management is to decide on correct level of detail for success; too much detail, you drown in minutia; too little detail, you miss important details that can destroy the Project.)
Example: Jean's *WBS* for one activity: *Planning the Presentation Agenda.*

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                    ┌──────────────┐
                    │ Presentation │
                    │    Agenda    │
                    └──────────────┘
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Plan Logistics	Produce Briefing Documents	Invite Stakeholders	Create PowerPoint Presentation	Set Agenda

Plan Logistics subtasks:
- Secure Conference Room
- Design room layout, AV needs
- Arrange for set up, break down
- Arrange catering for 15: Continental breakfast
- Review catering selections and revise
- Review floor plan and revise
- Other Subtasks

Estimating

Jean is responsible for doing all planning and coordinating the information, decisions, and actions of the other Stakeholders. She will need to allow enough time to contact each person, meet with them, request information, follow up to get the information, follow up to get the decision, and follow up to verify actions are taken. All these communications take time in the Project. Look at the task, "Secure the Conference Room." She has allotted an hour. This takes into account, making several calls or sending and receiving emails/texts, meeting with the Facilities Manager about the Conference Room and reporting information.

Jean is trying to plan the Subtask, "Design room layout." She has done something similar in the past. She knows she can probably complete the initial design in about an hour, allow a day for Mark to review it, and spend another half-hour revising it. However, when she actually began the design, she received information from Maintenance the room has been modified since the last time she used it. Now she must begin her plan from scratch taking 3 hours. Meanwhile, Mark has decided to make changes in the program so the room layout must change again. The revisions take another 3 hours. Because Jean also had other work to complete at the same time, the Project is now delayed one day. Jean did not take into account things that could impact the activity.

Budget

In many cases, management presents the budget for the Project to you. Where you do have some responsibility for budgeting, you will be asked to develop the projected costs. For example, in planning for the Survey, Jean's manager asked her to develop a budget for catering the presentation meeting.

How do we develop a budget?

1. Create a list of questions that Jean would need to answer in order to develop a budget for catering?

2. What are the steps you would take to answer these questions?

3. Design a simple budget report listing the items you would include.

How do we develop a Logic Diagram?

1. Examine the Subtasks for the Logistical Planning for the Presentation meeting.

2. Which tasks can be performed simultaneously? Which tasks must take place in a particular order?

3. Create a Logic Diagram for this set of sub tasks by placing each in a box and connecting them with arrows.

SUBTASKS (for Logistical Planning)
Secure Conference Room (1 hr.)
Design floor plan, AV needs (3 hrs.)
Arrange for set up, break down (1 hr.)
Arrange catering for 15: Continental breakfast (2 hrs.)
Review catering selections and revise (2 hrs.)
Review floor plan and revise (2 hrs.)

4. Add the times to the arrows. Demonstrate the Critical Path on the Logic Diagram. (The Critical Path is the shortest path in the Logic Diagram.)

Project Plan
Project: Survey Presentation Meeting   **Project Manager:** Jean
Objective: Complete a plan for the Survey Presentation Meeting (I)
Activity: Meeting Planning (A)   **Date:** 8/1

TASK #	TASK	TASK DESCRIPTION	PERSON	TIME (HRS)	DUE DATE	MEASURE	STATUS
IA001	Plan Logistics		Jean		10/1	Logistics complete	I/P
		SUBTASKS					
IA001a		Secure Conference Room		1	8/1	On master maint. schedule	Complete
IA001b		Design floor plan, AV needs		3	8/8	Design approved	I/P
IA001c		Arrange for set up, break down		1	8/10	On master maint. schedule	N/A
IA001d		Arrange catering for 15: Continental breakfast		4	9/15	Catering menu on kitchen schedule	N/A
IA001e		Review floor plan and revise		2	8/9	Approved plan on master maint. schedule	D*
IA001f		Review catering selections, revise		2	9/1	Catering menu/plan approved	D*
IA002	Produce Briefing Docs						
		SUBTASKS					
IA002a	Xxxxxx	Xxxxxxxxxxxxxxxx	Xxxxx	Xxxx	Xxxx	Xxxxx	xxxx

Status: I/P = in progress, N/A = not accomplished, D = delayed, R = removed

Notes: IA001e = Initial meeting with Mark delayed one week, could impact schedule
          IA001f = Cannot begin until new budget available, could impact schedule

Gantt Chart

Project: Survey Presentation Meeting **Project Manager:** Jean **Report Date:** 8/1

TASK #	TASK	DUE DATE	ACTUAL VS PLAN					

		DUE	AUG	SEPT	OCT	NOV	DEC
IA001a	Secure auditorium	8/1	▓/█				
IA001b	Design Floor Plan	8/8	▓▓/█				
IA001c	Arrange setup/down	8/10	▓/█				
IA001d	Arrange catering	9/15		▓▓			
IA001e	Review floor plan	8/9	▓				
IA001f	Review catering	9/1		▓			

The chart shows clearly that IA001a, is complete, IA001b is in progress and the others have not begun. IA00c is ahead of schedule. Each week the progress is plotted.

RACI for this set of Tasks

TASK	JEAN	MARK	JUAN	SAM	ALICE	OTHER
Secure auditorium	A					Facilities Mgr = R
Design Floor Plan	R	A	I	C		Facilities Mgr = C
Arrange setup/down	A					Facilities Mgr = R
Arrange catering	A	I		I	I	Food Service Mgr = R
Review floor plan	C	A		I		Facilities Mgr = C
Revise floor plan	A/R	I		I		Facilities Mgr = C
Review catering	A/R	I		I	I	Food Service Mgr = R

R = Responsible to perform work; **A = Accountable** for results (1 person/task);
C = Consulted for information, decisions**; I = Informed** about results/progress

Milestones

Jean planned six Milestones:

1. When survey project plan finished, review it with stakeholders.
2. When pilot survey completed review results with stakeholders.
3. When survey completed review preliminary results with Mark.
4. When survey analysis completed review results with Mark, Sam, Juan.
5. Survey results presented to all HR executives, managers
6. When the new procedures written and survey system approved by Mark, Juan, COO.

Agenda

Good agendas have a purpose, a statement of expected results, objectives, and a list of topics with times, circulated in advance.

Sample Survey Planning Meeting – Planning

Date: April 15   **Invited:** Jean, Mark, Juan, Sam, Alice
          Mark's Conference Room, 9 – 10:15 AM, Coffee
Purpose: Begin planning for the new customer survey
Objectives:

- Understand the goals of the survey
- Assign survey planning tasks
- Set a meeting schedule

Agenda:

1. Introductions -- Jean   9:00
2. Kick Off: Goals of the Survey – Mark, Sam, Juan   9:05
3. Presentation of logistical concerns – Jean   9:20
   - Consideration when working with 20 top customers
   - Developing survey questions, script
   - Issues when communicating with customers
4. Discuss survey goals, considerations for planning – Mark   9:50
5. Set meeting schedule   10:10
6. Adjourn   10:15

Meeting documentation:

Taking "minutes" at meetings is not a task people like. Documentation should be brief and to the point. There is no need to keep discussion details. Record group **decisions** and an **Action Plan;** what will be done, by whom, when, and how it will be measured. If the group generates lists of ideas, record them for future reference. Circulate minutes immediately. Add new tasks to the project plan.

Sample Meeting Minutes (Jean's first meeting for the Survey Project)

Date: April 15   **Attendees:** Jean, Mark, Juan, Sam, Alice
Decisions:

- **Jean:** coordinate work of project team; keep, organize all project information. As PM, keep team members informed with minutes after each meeting
- **Mark:** Get high level information from Juan on his survey needs
- **Jean:** Get the details from Juan and Sam on survey needs
- **Jean**: Follow up with each team member to discover Survey needs
- **Sam:** Provide Jean external customer survey guidelines
- **Alice:** Provide Jean accounting codes, forms, schedules to manage budget.
- **Juan:** Meet with the COO to review 20 top internal customers for the pilot.

Action Plan:

Task	Person	Due Date	Measure
Distribute minutes	Jean	4/16	Minutes distributed
Survey needs	Juan	4/26	Report to Jean
Detail survey questions	Jean	5/3	Survey questions complete
Survey needs	Jean	4/30	All input complete
Customer survey guidelines	Sam	4/18	Guidelines received
Accounting info	Alice	4/18	All info received
Customer survey decisions	Juan	5/10	All info received

Important Ideas:

- Because of new budget concerns and possible cuts, Juan will explore feasibility of web meetings rather than site visits.

Items for next meeting:

- Come prepared to review preliminary survey questions
- Mark will have a budget update

Next meeting: April 21, Mark's Conference Room, noon, bring lunch

How do we solve a Project Problem?

Jean has run into roadblocks for her survey Project. Sam and Juan are having difficulty agreeing on how to conduct the interviews and on standard questions. They have very different ideas and the only compromise they seem willing to make is to double the size of the pilot survey. This means more customer interviews and missing the original dates. The COO expects to present survey results at the annual board meeting. There is no flexibility on that date.

Alice says increasing survey population size or doing extensive program modifications will blow the budget, which has already been cut. She has complained that Juan never gives her details for planning and seldom provides documentation to rework the budget. Juan says he is too busy to look at details and meaningless bureaucratic procedures. Juan wants Alice to use the figures from a similar project and come up with her best estimate.

Jean hasn't been able to get input from Mark, who is traveling. She's frustrated people are not working well together. She doesn't understand why expanding the survey is so important but she knows that it is causing problems. She decides to pull the team together to see if they can solve the problem together.

What is the problem definition?

1. Create a simple agenda for this meeting.
   _____
   _____
   _____

2. Agree on a Problem Definition.
   _____
   _____
   _____

3. What does the team need to do to find a solution?
   _____
   _____
   _____