

## Executing, monitoring, closing and reviewing a project

### Executing a project

#### *Though effective project leadership*

Leadership in organisations concerns the exercise of power to some degree. While seniority and power tend to go hand in hand, power can also often be found elsewhere in an organisation.

And why are we concerned with power in relation to project management? Because power is the ability to influence behaviour and achieve a preferred situation or outcome.

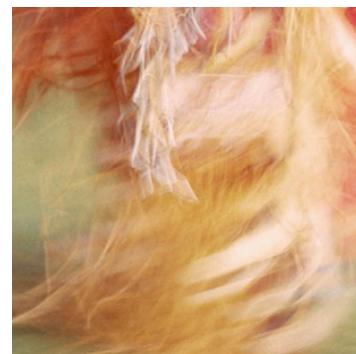
As part of the project management process, the project manager needs to be concerned with influencing the situation to achieve the project objectives, balancing four main elements:

- ◆ Ensuring the project tasks are completed on time and to quality
- ◆ Co-ordinating the work of team members and developing team work
- ◆ Supporting individual team members in their work and developing their skills
- ◆ Communicating with the project sponsor, project customer, and other stakeholders

### *Teamworking*

Teams are a collection of diverse individuals! And those individuals have certain common needs in a team environment:

- ◆ common goals
- ◆ leadership
- ◆ interaction and involvement of all members
- ◆ maintenance of individual self-esteem
- ◆ open communication
- ◆ power within the group to make decisions
- ◆ attention to process and content



*'Executing, monitoring, closing and reviewing a project' gives you key pointers on three of four key stages in managing a project. (For information on the first key stage, see 'Defining a project'.) The section on executing a project takes you through the four main elements of project leadership, and the common needs for effective teamworking, which include conflict resolution. The section on monitoring a project points out the importance of actively controlling a project, regular reporting, and how to minute project meetings. The final section focuses on agreeing completion criteria, holding a closing meeting, and evaluating the project for learning.*

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- ◆ mutual trust
  - ◆ respect for differences
  - ◆ constructive conflict resolution

Conflict can build or destroy teams. Reasons for conflict arising can be manifold but might include:

- ◆ Inadequate authority given to project manager
- ◆ Lack of understanding of project objectives by project team or others in organisation
- ◆ Responsibility ambiguity in team
- ◆ Individuals don't like each other
- ◆ Resource, schedule and cost issues

*Conflict can build  
or destroy teams*

While conflict can bring problems into the open and also lead to more detailed work and promote creativity, it can create stress and unpleasantness. In good conflict situations, a win-win solution can usually be achieved. In bad conflict situations, a win-lose or lose-lose solution is likely. It is essential that the project leader works to create good conflict situations, by usually promoting direct debate and turning attention at times to areas of agreement rather than focusing only on the areas of disagreement.

## Monitoring the project

### *Control*

Monitoring and controlling projects once they are in motion is vital. This is an active rather than a passive role involving:

- ◆ Measuring progress
- ◆ Evaluating the causes of deviations from plans
- ◆ Correcting deviations by taking action

To keep control, a project manager needs to keep observing the situation – this requires leaving one's desk! It also requires one-to-one meetings with team members, the customer, and the project sponsor, documenting progress at key stages.

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Control also means reviewing the project risks. Risks change through the project lifecycle and awareness is vital of risks that:

- ◆ Are about to happen – and become an issue
- ◆ Are new, due to changes in the project since the definition phase or simple lack of awareness that this risk existed
- ◆ Have changed their ranking
- ◆ Are no longer relevant

Incorporate a review of risks at team meetings, at least on a monthly basis for a project with a duration of 6-12 months.

### *Regular reporting*

Most projects benefit from the discipline of preparing a regular report for the project sponsor. On projects over a short timescale this may be once a week. Rarely should it be less frequently than once a month.

Preparing this report is important for keeping the project sponsor informed but absolutely vital for the project manager in ensuring that s/he is monitoring the project closely enough.

Essentially reporting on a project should be against the project brief and project plan – what areas are on track? What areas are not on track? What current issues are there and how are these being resolved?

*Regular reporting  
to the project  
sponsor is vital*

### *Minutes of project meetings*

It may seem obvious what to include in the minutes of meetings but bad practice proliferates!

The purpose of minutes of meetings is to record:

- ◆ Who was there
- ◆ Who should have been present but wasn't
- ◆ What was discussed
- ◆ What actions were agreed
- ◆ Who would be responsible for implementing each action
- ◆ Dates for completing these actions
- ◆ Uncompleted agenda items

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Good practice for taking minutes includes:

- ◆ Numbering each item
- ◆ Using an action column to identify the person responsible for implementing the decision
- ◆ Reporting agreed actions, not the complete debate
- ◆ Recording dissenters from agreed actions
- ◆ Recording when people joined and left the meeting
- ◆ Noting absentees and ensure minutes are circulated
- ◆ Preparing and distributing minutes as soon as possible after the meeting

## Closing and reviewing a project

### *Closure*

Two things form the basis of a successful project closure:

1. Agreeing with the customer/s and project sponsor the completion criteria
2. Holding a closing meeting with careful preparation

### *Completion criteria*

The completion criteria are established partly by a review of the project tasks by all parties. This will identify unfinished project tasks. However, depending on the type of project, there are also likely to be matters such as:

- ◆ Testing of solutions
- ◆ Preparing documentation manuals
- ◆ Establishing training requirements
- ◆ Identifying outstanding issues requiring resolution, etc.

Some of these tasks will have been identified at project definition phase but some of them may emerge at this stage. It is only by discussing the project's closure with key stakeholders that expectations and the completion criteria can be finally defined.

*Consult key stakeholders on the detail of the completion criteria*

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## *Closing meeting*

Use a closing meeting to review the project, and provide the information you need to complete the post-project evaluation as well as tidy up details for the project's closure.

Use the closing meeting to:

- ◆ Review project deliverables
- ◆ Discuss areas for handover and to whom
- ◆ Confirm any action plans for completing outstanding work
- ◆ Confirm any outstanding issues and the path to their resolution
- ◆ Thank those involved for their efforts

## *Handover*

There may be a follow-on project or indeed several follow-on projects. Regardless of whether you are involved in these future projects or not, making the information about your project available to others is part of a professional handover.

## *Post-project evaluation*

While each phase requires review, there is also value in post-project evaluation. This is often difficult because most people on the project are 'moving on' to focus on their next assignment/s.

Question: why evaluate?

Answer: to learn.

Using the project brief and the project plan together with the team meeting minutes and regular reports, review the project, evaluating the successes and the failures.

Prepare a report, ensuring that the 'tone' of voice is positive and that your comments point to something to learn for future projects. Avoid negative comments, expressing the content as factually as possible and including a point for learning.

*Why evaluate?  
To learn*