

# **BSB50420**

## **Diploma of Leadership and Management**



## **Workbook**

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## Business Leadership - Workbook Overview

If you are working in a small or large business, have staff reporting to you or are new to managing staff, then the Diploma of Leadership and Management may be the most practical way of improving your skills and knowledge to achieve better results. This workbook reflects the role of individuals like you who apply knowledge, practical skills and experience in leadership and management across a range of business contexts.

The Business Leadership cluster covers the following units from the Diploma:

BSBCMM511 Communicate with influence  
BSBOPS502 Manage business operational plans  
BSBPMG522 Undertake project work  
BSBTWK503 Manage meetings

Successfully completing this workbook and the associated assessment will provide you with the evidence for four or the 12 units required for this qualification.

## Business Leadership – an Introduction

### Managing and Leading in Business

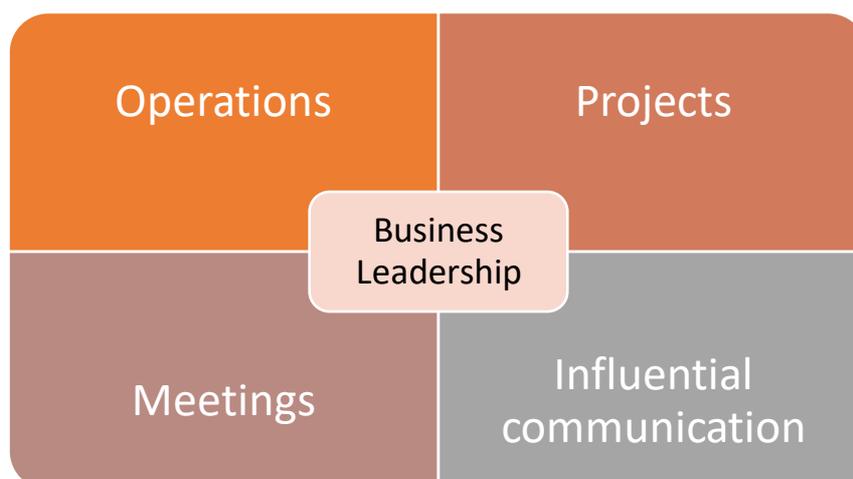
According to business writer, Sharon Penn, a well run organisation is one that:

1. Emphasises purpose over busy-ness
2. Keeps staff happy
3. Employs effective leadership styles
4. Is adaptable to all foreseeable situations
5. Has realistic expectations of performance

However, what *really* makes a business effective can vary considerably based on individual point of view and the organisation's context.

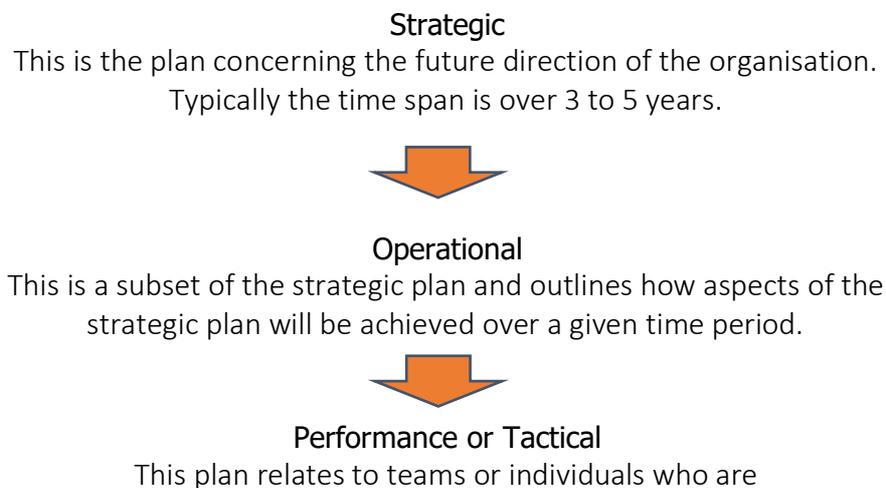
What does an effectively managed business look like to you?

In this workshop, we will explore business operations, running projects, innovative business practices, and the process of continuous improvement. We will discuss the theory and the practical actions you can take to run a more effective organisation.



## Planning Operations

In a well-planned organisation there will be a cascading set of plans that take their lead from the strategic or business plan and lead into individual employee plans. Each plan is connected to the next.



### Alignment planning model

To ensure strong alignment between the organisation's mission and its resources, this model helps to fine-tune strategies or investigate why strategies are not working. Steps of the process include the following:

1. Outline the organisation's mission, programs, resources and support requirements.
2. Identify what strategies and programs are working well and what needs improvement.
3. Determine what improvements need to be implemented.
4. Include the improvements as strategies in the strategic plan.

### Scenario planning

This method promotes strategic thinking and is useful in identifying strategic issues and goals. It includes the following steps:

1. Examine external forces and predict related changes which might influence the organisation.
2. For each change discuss different possible future scenarios for the organisation: this should include best- and worse-case scenarios as these can be a strong source of motivation for organisational change.
3. Identify potential strategies to use for each of the possible future scenarios.
4. Look for common strategies that must be addressed to respond to possible external changes.
5. Select the most likely scenarios to affect the organisation, and identify the most reasonable strategies to adopt.

### Discuss other approaches to planning

## Defining Operational Plans

Operational plans support strategic plans. They are established by middle and frontline managers to achieve certain goals and targets over a short to medium time frame, e.g. one to three years. They are much more detailed than strategic plans as the results become more tangible and measurable. Operational plans are where 'the rubber hits the road' and will answer the following questions:

- what
- why
- when
- where
- how
- who.

The exact form of an operational plan will depend on the nature of the business and will be specific to the work group and organisation. Some points to consider when devising an operational plan include:

<b>Capacity</b>	Capacity is the measure of how much work your facilities, labour force, and equipment can handle. Your plan must demonstrate it has the capacity to meet orders and has contingencies for when you have too much or not enough capacity.
<b>Productivity</b>	Productivity measures how many people and the length of time it takes to produce your product or service. If you can produce more goods in less time to specification, you can improve the return on operating costs such as salaries and rent.
<b>Human Resources</b>	This involves determining what kinds of and how many employees you require to produce your product or service. It involves considering how you are going to deploy them. It also involves determining the category of human resources – full time, part time, casual, seasonal, new recruit or mature resources.
<b>Quality Assurance</b>	Quality assurance is designed to ensure that production is consistent and that you maintain the same standards with each product or service. Quality activities can include regular inspections throughout the production process, occasional testing or sampling of goods.
<b>Facilities</b>	The location of your facilities can prove a critical factor for your success. This includes the location of head office, branch offices and additional plants. Access to parking and transportation; air, rail, and surface shipping access, and loading docks, warehouse, and other facilities will also impact on operational efficiency. Improvements and maintenance should also feature in an operational plan. This includes the cost of gas, water and electricity, cleaning and rubbish removal.
<b>Inventory</b>	Each organisation will have different inventory requirements. Retail operations will have much more inventory than a legal firm. An effective inventory management process can impact greatly on operational efficiency and profit. The funds tied up in supplies or finished product sitting in your warehouse impact on your bottom line. Too much inventory and raw materials represent spent money and run the risk of losing value. Conversely, if you don't have sufficient inventory, you run the risk of being unable to produce or generate revenue.

<b>Distribution</b>	Experienced leaders develop strong relationships with suppliers and distributors; you want them to feel that you are in a partnership together so that they will try to do everything possible to meet your needs. However, it is a risk to become too dependent on just one supplier or distributor so source suppliers who understand the needs of your business and can deliver on time. Supply decisions based solely on price can also have limitations.
<b>Customer Service and Support</b>	The level of support your organisation will provide after a customer has purchased a product or service should be known and planned. This is particularly important in the case of new or technical product but can equally apply to services. An organisation can preserve and enhance its reputation and its relationship with customers by providing guidance and support after a sale. The fulfilment process provides an opportunity to impress or disappoint customers. Orders that are not communicated clearly or quickly will create delays for the customer. The methods by which goods or services are prepared for delivery or shipping should also be planned for and monitored.
<b>Context</b>	Identifying the broader legislative and environmental context of the business and the workplace – e.g. WHS Law, Employment Law, Intellectual Property Rights. Thorough planning and analysis of the day to day operations of your organisation is essential to reduce costs and improve productivity and provide the only way to ensure organisational objectives are met consistently.

What operational plans are you aware of in your organisation?

## 7 Steps of Operational Planning

### 1. Establish Goals

Clear goals make it easier to ensure that each team member and the team as a whole, knows exactly what is expected of them. Operational goals for the team must flow out of the strategic plan. Setting goals with the team can assist with gaining their buy-in and ultimately their willingness to achieve the goals.

The team can draw on a range of information such as competitor information, their environment, customers and product offerings. At least one goal ought to be devised for each key area of the operational plan. The goals will differ profoundly depending on the nature of the operations however the following are some examples:

- In an HR context goals might include: reduce labour costs, increase employee capability, or reduce un-paid holiday leave liability.
- In a production context goals might include: increase output, decrease wastage, or raising quality.
- In a service context goals might include: decrease waiting times, increase customer satisfaction ratings, increase customer referrals.

For best practices when consulting with your team, see the Government's Fairwork website: <https://bit.ly/3bNzMtJ>

How do your current performance measures relate to your organisation's goals?

Why is consultation so important when establishing operational goals?

## 2. Define Activities

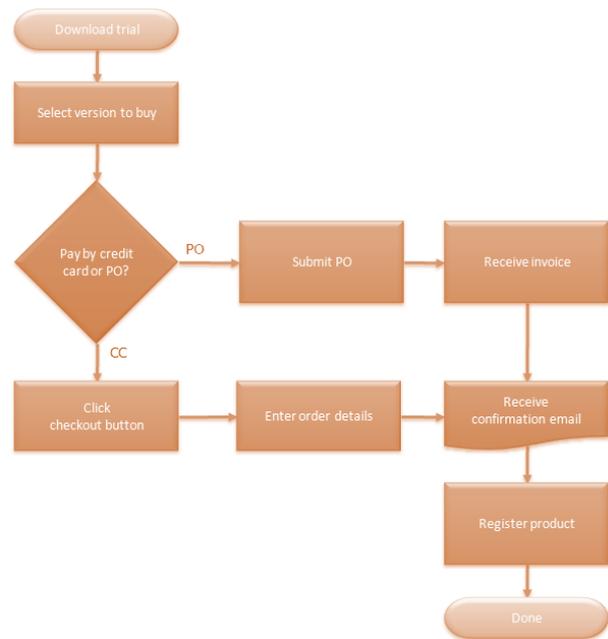
At this point in the planning process it is useful to specify how you will achieve your goals by defining the high level activities or processes. There are a number of ways to identify the activities including:

- brainstorming a list
- process mapping.

Each of these high level activities is likely to have sub-activities which can be included in the operational plan. If they are overly detailed, they should be documented in separate team plans. Often operational detail is specified in documents such as policies and Standard Operating Procedures (SOPs).

### Flow charts

Flow charts are used to visually map processes. Creating a flow chart can often help identify the relationships between steps and tasks within a process and highlight where potential or actual problems may occur. By creating a flow chart you are also better able to communicate with others what is expected and how their part in the process relates to the process as a whole. Following the steps in a flow chart also gives consistency in how the work is done. A flow chart highlights decision points in a process – if the answer is yes, do this, if the answer is no, do that.



Source: <https://www.breezetre.com/articles/excel-flowchart-shapes/>

### Customer journey maps

A customer journey map describes the end-to-end experience that customers have with your product, service or brand. This can include the steps they take before, during and after engaging with you. By understanding your team’s activities and outputs from a customer’s perspective, you are better able to determine the most important activities that you should be engaging in.

What are some of the high-level activities conducted in your organisation?

### 3. Develop Key Performance Indicators (KPIs)

A standard way of measuring aspects of operational performance is to define and develop Key Performance Indicators (KPIs). The KPI system needs to:

- align with organisational goals
- establish KPIs as outcomes with clear measures
- measure the big elements of each goal, not all elements
- incorporate stretch targets where appropriate
- modify KPIs to suit the existing management information system, and decide where this system needs to be improved to generate better KPIs in the future
- be consistent over time to allow for historical comparisons

If a KPI is going to be of any value, there must be a way to accurately define and measure it. This creates the difference between effective and ineffective KPIs. Take these examples:

## Ineffective

Title of KPI: Improve service levels  
Defined: Customer feedback improvements over time  
Measured: Number of positive responses.  
Target: Increase each month.

What's missing?

## Effective

Title of KPI: Employee Turnover.

Defined: The total of the number of employees who resign for whatever reason, plus the number of employees terminated for performance reasons, and that total divided by the number of employees at the beginning of the year. Employees lost due to Reductions in Force (RIF) will not be included in this calculation.

Measured: The database containing records of each employee. The Comments section lists the reason and date of separation for each employee. Monthly or when requested by the manager, the HR department will query the database and provide Department Heads with TurnoverReports.

Target: Reduce Employee Turnover by five per cent per year.

Approaches to developing KPIs are discuss below.

### *Lifecycle approach*

A lifecycle applies to projects being conducted within the organisation. KPIs would focus on each stage of the project life cycle such as initiating, planning, implementation and finalisation. The use of a lifecycle approach to developing KPIs ensures they are assigned to specific stages in order to achieve the outcomes needed to progress to the next stage.

### *Risk-based approach*

This approach identifies specific services, functions or activities that may have a negative or detrimental impact on the organisation. Through identifying areas of risk, KPIs can be used to measure progress towards mitigating the risk. A well known example is limiting LTI's (lost time injuries) in high risk workplaces such as resources and construction.

### *Cause and effect*

This technique helps identify KPIs for addressing the fundamental or underlying cause of ineffective or inefficient services, functions or activities. The approach analyses the cause(s) and identifies KPIs that address the effect. By addressing the effect, improvements can be achieved.

### **KPIs in your organisation**

Briefly discuss the KPIs used in your role or within your team. What approach do you think was used to develop them?

For a list of potential KPI measurements, go to:

<https://www.spectraining.edu.au/bsbmgt517-page-2>

#### 4. Resource the Plan

Once you have generated all of the activities that are required to achieve a particular objective you need to resource them.



Human



Physical



Technical



Financial

Resource planning consists of three steps:

1. assess your current resources
2. assess the required/future resource needs
3. develop a plan to address resource gaps

Where needed, you should consult with specialist resource managers in order to obtain the best possible advice. Examples of this include:

- technical experts.
- human resourcing specialists
- procurement officers
- property advisors
- accountants and business finance advisors

#### Human Resources

Critical to the success of your operation is ensuring you have the right people with the right skills in the right place at the right time doing the right thing. Tools that can assist in organising human resources include:

- Action Planning Worksheet
- Planning Chart
- Staff Availability Chart

#### HR planning

How are human resources planned for and allocated in your workplace?

### Action planning worksheet

You can make action planning worksheets as detailed as you want. The simplest ones only show the steps required to complete a project or a discrete piece of work. Additional information (such as beginning dates, target completion dates, cost estimates, and who is responsible) can be added as required. Here's a simplified example:

Task description	Who is responsible	Resources cost (est)	KPI	Start date	Review date	End date
Inventory control	Refinery operator	\$60,000	Inventory maintained between 60ML and 80ML	July 1 <sup>st</sup> 2020	August 30 <sup>th</sup>	January 1 <sup>st</sup> 2021
Maintenance shutdown scheduling	Maintenance supervisor	\$65,000	Downtime for maintenance <5% of operation time	July 21 <sup>st</sup> 2020	August 30 <sup>th</sup>	January 1 <sup>st</sup> 2021
Refinery centre maintenance	Maintenance crew	\$20,000	Maintenance completed in time and per centre SOP	August 20 <sup>th</sup> 2020	September 15 <sup>th</sup>	January 1 <sup>st</sup> 2021

### Planning Chart

Your worksheet can also be used to create a planning chart like this 'Gantt Chart':

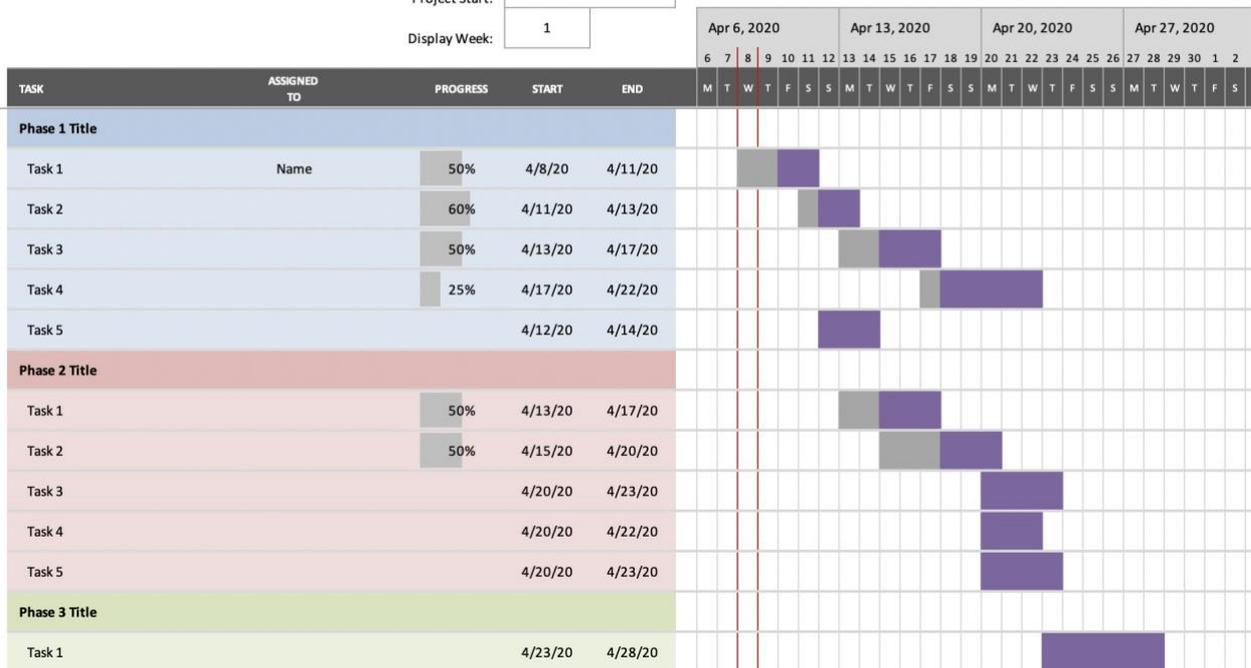
#### PROJECT TITLE

SIMPLE GANTT CHART by Vertex42.com  
<https://www.vertex42.com/ExcelTemplates/simple-gantt-chart.html>

Company Name  
 Project Lead

Project Start:

Display Week:



## Staff Availability Chart

To ensure you have the right people in the right places at the right time, it can be beneficial to use a staff availability chart. This can be used to illustrate your staffing mix on a weekly or monthly basis. Here's a simplified example:

**Weekly Schedule**

Period Start Date :

**Publish & Notify**  
 Text the schedule to your staff

Staff	Sun 13	Mon 14	Tue 15	Wed 16	Thu 17	Fri 18	Sat 19
Employee 1 \$300   20 / 40	11:00 AM - 3:00 PM Coordinator	1:00 AM - 3:00 PM Front Desk		3:00 AM - 7:00 AM Coordinator	7:00 AM - 3:00 PM Coordinator		
Employee 2 \$60   4 / 40							3:00 AM - 7:00 AM Team Leader
Employee 3 \$180   12 / 40			7:00 AM - 3:00 PM Team Leader	3:00 PM - 7:00 PM Front Desk			
Employee 4 \$240   16 / 40	11:00 AM - 3:00 PM Team Leader	7:00 AM - 3:00 PM Coordinator				3:00 PM - 7:00 PM Coordinator	
Employee 5 \$180   12 / 40					7:00 AM - 3:00 PM Support		11:00 AM - 3:00 PM Support
Employee 6 \$300   20 / 40	7:00 AM - 3:00 PM Team Leader	3:00 PM - 7:00 PM Front Desk			3:00 AM - 7:00 AM Support	3:00 PM - 7:00 PM Support	
Employee 7 \$120   8 / 40				7:00 AM - 3:00 PM Team Leader			
Employee 8 \$180   12 / 40				3:00 PM - 7:00 PM Team Leader		7:00 AM - 3:00 PM Front Desk	
Employee 9 \$120   8 / 40		3:00 PM - 7:00 PM Front Desk					3:00 PM - 7:00 PM Support
Employee 10 \$60   4 / 40		11:00 AM - 3:00 PM Team Leader					
Employee 11 \$180   12 / 40	7:00 AM - 3:00 PM Front Desk				11:00 AM - 3:00 PM Front Desk		
Employee 12 \$60   4 / 40					11:00 AM - 3:00 PM Support		
Employee 13 \$0   0 / 40							
Employee 14 \$240   16 / 40		7:00 AM - 3:00 PM Coordinator				7:00 AM - 3:00 PM Support	
Employee 15 \$0   0 / 40							
<b>148 / 600 hours</b>	24.00	32.00	8.00	20.00	28.00	24.00	12.00
<b>Labor Cost \$2,220.00</b>	\$360.00	\$480.00	\$120.00	\$300.00	\$420.00	\$360.00	\$180.00

For access to multiple staff allocation worksheets, go to: <https://www.smartsheet.com/free-work-schedule-templates-word-and-excel>

## Human Resources Planning

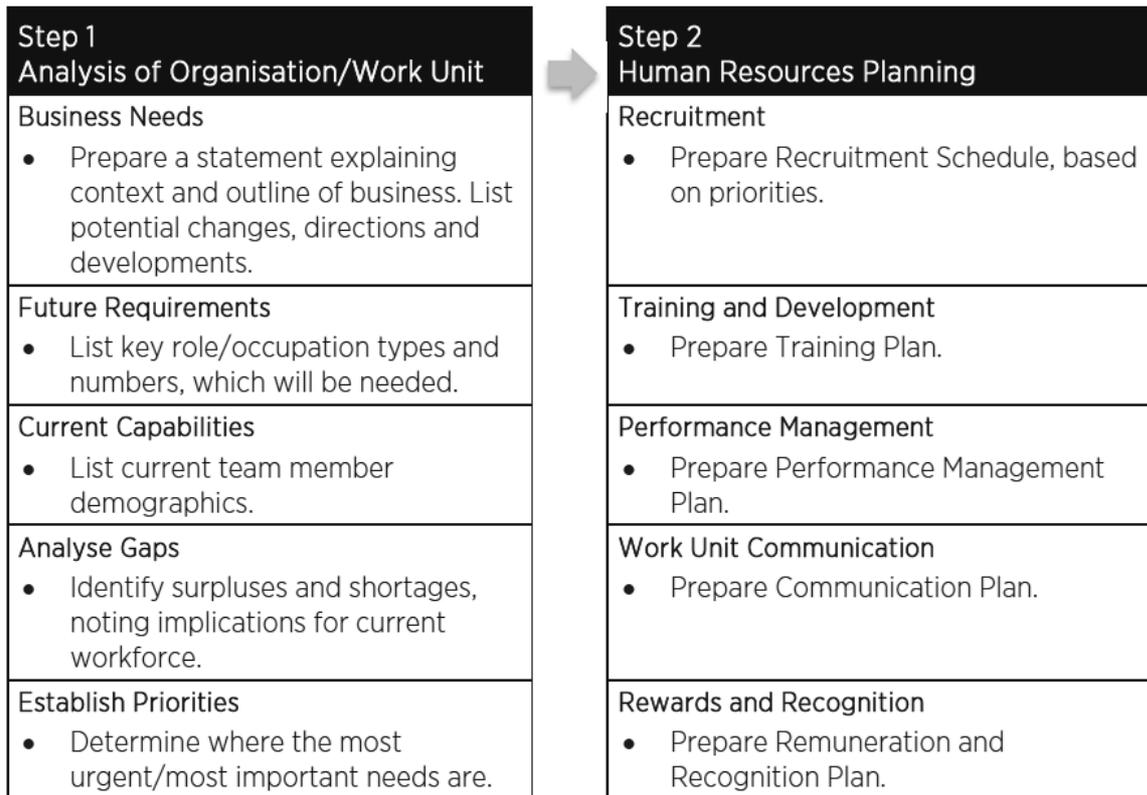
What people do you need versus what people are available? To answer this question you need to consider a range of factors, looking at what is needed immediately and what will be needed in the future. Once you have determined the need, compare it with what is currently available. The two stages of Human Resources Planning are:

### 1. Workforce Analysis

Consider 'What have I got now and will it suit my needs in the future'? Specific issues such as job analysis, job design and specifications must also be considered. Particular jobs that are performed certain ways will not necessarily be the same in the future. Technology in operations can change, which has a significant impact of how jobs are structured or exist at all.

### 2. Human Resources Planning

In Step Two, the results of the Workforce Analysis are worked into a Plan. Some needs identified in the Workforce Analysis step may require multiple strategies and an integrated approach. For example, a shortage in particular skills may be met through a combination of recruitment of new workers, training of existing people in new skills and clarification of roles and performance standards.



### *Recruitment and selection of the team*

If your organisation doesn't have the people you need to execute the operational plan, you need to acquire them. Human resources can be engaged in a number of ways including:

- secondments
- contractors/ consultants
- casual employees
- permanent workers.

Effective recruitment means attracting and hiring the best candidates for the position. Recruitment and selection processes are subject to equal employment and anti-discrimination legislation. The recruitment process is covered in more detail here:

<https://www.spectraining.edu.au/bsbmg517-page-3>

### *Physical, Technical and Financial Resources*

#### Physical assets

Physical assets include all equipment used by your team or managed by you. You might be responsible for the initial purchase of the asset and are likely to be responsible for managing those assets from the time when they are obtained through to disposal and replacement.

Asset management entails:

- recording the asset in the company ledgers
- planning maintenance in accordance with the manufacturer's instructions
- adopting a life cycle costing model including identifying the asset's life expectancy
- planning to replace the asset at the end of its expected life.

#### *Budgeting*

In a larger organisation, your team will normally have a profit budget allocated to it at the beginning of the financial year. In simple terms it is calculated as follows:

- Revenue expected less cost of goods sold (if applicable) = Gross profit
- Gross profit less expenses = Net profit

In a commercial enterprise, you need to set up a system to monitor the gross profit and net profit closely, which in turn will come down to:

- maximising your total revenue (getting plenty of customers)
- maintaining your gross profit margin (making sure you charge the right price)
- minimising your expenses (being efficient).

You should be able to monitor your income and gross profit daily through your accounting system and your expenses at least monthly through the profit and loss statement. Control mechanisms are recommended to ensure expenses are authorised correctly.

*Monitor via Profit and Loss reporting*

A profit and loss statement is a summary of the financial performance of a business over time (monthly, quarterly or annually is most common). It reflects the past performance of the business and is the report most often used by organisations to track how their business is performing.

**Activity: Investigating a P&L**

The following link will take you to a profit and loss statement for a fast growing global company. Record your interpretation of the statement below.

What company is it?

Is it profitable? How can you tell?

Are the operations of this company being managed well in your opinion? Why?

### *Acquiring resources*

Most organisations have established procedures and templates for acquiring resources. These must be followed to save you time later. Members of your team need to be made aware, through your operational plan, of the policies and how they are implemented.

For example:

- Irrespective of the operational plan, there may be financial delegation limits on authorising purchases. For example, the CEO may be the delegate for all purchases over \$5000. Even if your budget has been approved, the approval for the purchase will have to be signed off by the CEO if it is over that amount.
- There may be policies on Australian content of purchases.
- You may (and should) check whether there are resources available through your own organisation's stockholding.
- Your IT department may have to approve computer purchases to ensure compatibility with the organisation's operating systems and software.
- Your maintenance section may have to approve equipment purchases for:
  - Service contracts
  - Maintenance procedures and liabilities
  - Compatibility with existing equipment for repair parts procurement.
- All purchases may have to be processed by your purchasing section. This is recommended because they would normally have greater awareness of best value options.

### *Supplier Selection*

As a manager you may have to source an item or a service not previously purchased by your organisation. To do this you will need to discover a source of supply; or a number of sources. Companies that are quality assured often invite suppliers to enter a selection process which, if they pass, places them on a 'preferred supplier' list for a specified time. This process gives probity to the selection process and streamlines procurement at the time of purchase. It also details a number of suppliers for each resource which can be an effective risk mitigation strategy.

When assessing potential suppliers, these criteria can be considered:

- ability to supply within specification, budget and time frames
- existing relationship with the supplier
- quality methods and processes
- relevant industry accreditation and certification
- prior experience in delivering the product or service
- management of risk
- adherence to contractual requirements
- degree of sub-contracting or out-sourcing
- documented assumptions, exclusions and expectations.

### *Contingency Planning*

Unexpected changes can alter a plan or present road blocks that must be overcome. Good planning takes into account possible risks to the plan's success and prepares for them by having appropriate contingency plans. Contingency plans cannot be formulated for every perceived event, but you can identify the highest risk areas and develop contingency plans accordingly.

An operational example is a contingency plan for over or under production. The plan could include:

- levelling under-load conditions
- acquiring more work
- pulling work ahead that is scheduled for later time periods
- reducing normal capacity
- reducing over-load conditions
- eliminating unnecessary requirements
- rerouting jobs to alternative machines, workers, or work centres
- increasing normal capacity
- subcontracting
- increasing efficiency of the operation
- pushing work back to later time periods
- revising the master schedule.

Other contingency options may include adding another shift or working overtime. Naturally, cost considerations would need to be part of the contingency planning process.

For a summary of risk and contingency management, go to: <https://www.spectraining.edu.au/bsbmgt517-page-3>

## **5. Communicate the Plan**

### *Getting the Green Light*

Operational plans can 'make or break' a company. They are often carefully scrutinised by senior management, especially when they require significant resources or entail major change. Approval to implement an operational plan is often gained by presenting it to senior management together with an accompanying business case. There is no set format for a business case, however, the following are suggested key headings:

- Brief background of situation - why the situation has come about.
- Purpose of Business Case – the reasons why you are seeking approval to proceed.
- Costs – a breakdown of costs associated with implementing the business case.
- Targets – what you hope to achieve, this should be quantified.
- Benefits/Outcomes – additional benefits outcomes from implementation, either quantitative or qualitative.
- Key stakeholders – who are the key stakeholders who will have input into or will be affected by the implementation?
- Risks and mitigation of risks – risks associated with not proceeding and with proceeding – consider doing a risk matrix to ensure all risks are captured.
- Resources – physical and human resources require for the implementation.
- Timelines – a schedule for implementations and the realization of results/targets achieved.

- Cost/benefit analysis - A cost-benefit analysis provides a quantitative summary of the positive and negative outcomes associated with the business case. It focuses on the financial side, primarily:
  - What will it cost the organisation to undertake?
  - What are the savings for the organisation or what additional funds will it bring to the organisation?
  - Do the positives outweigh the negatives?
  - When undertaking a cost-benefit analysis, think about the hard, soft, and intangible costs.
- Options - It is common for business cases to cover at least three options. Usually these are:
  - No change and the risks involved with doing nothing;
  - An option or several options that are not desirable for a stated reason, but which could be implemented; and
  - The desired option and why this should be implemented. The reasons for having options in your business case are:
    - To ensure that you can demonstrate that you have considered the alternatives; and
    - To justify why a particular option is the best course of action to take for specified reasons
- Recommendations – a summary of the key recommendations.
- Signature blocks –

Author: .....

Director: .....Supported/Not Supported

MD/CEO: .....Approved/Not Approved

An executive summary is often attached as a front page for longer more complex plans. It is a concise yet complete stand-alone document showing key points and recommendations.

*What the 'Approver' will be looking for*

The approving authority will be looking for the costs and outcomes of the plan and any specific risks that have been identified and how they will be treated. There may also be some political and community issues to consider. After the plan has been approved it is time to implement it. If team members have been actively involved in the consultation process then this stage can focus on:

- Specifying key dates
- Ensuring everyone is clear about their specific responsibilities
- Transition arrangements
- Celebrating the work that has gone into the plan so far
- Keeping the team focussed on the vision

### *Inform the team*

Whilst you will have included your team throughout the development of the plan it is important to celebrate the finalisation of it and to inform them of the date when it will be implemented. 'Just-in-time' timeframes work the best for operational planning. That is, announce that the plan will commence with just enough time to create a buzz of excitement and a sense of 'let's get started' but also ensuring that people are adequately prepared and that all the resources they need are in place. If too much time is allowed then complacency and even disruptive behaviour may occur.

### *Communicating upwards and sideways*

It is also important to make other executives and departments aware that your plan is now approved and about to become operational. Communications can take the form of:

- briefings
- email announcements
- posts on intranets
- one-on-one discussions

## **6. Implement the Plan**

At this stage in the process the plan becomes officially enacted. From this moment on, the role of the manager becomes one of monitoring, reporting, analysing and adjusting. While some plans will be very straightforward and easy to monitor and control, others may be subject to factors that even contingency planning couldn't have accounted for.

Once the plan is in place and being executed you will need to monitor that targets are being achieved, including plan progress. Monitoring plans is a process of gap analysis:

- Compare the achieved performance to date with the planned performance.
- Identify the positive or negative differences between actual and planned performance.
- Identify the reasons for any differences.
- Decide what action to take.
- Gain approval for the action if necessary.

It is also during this stage that the manager needs to ensure ongoing support for the team members responsible for delivering the plan and all the agreed outcomes. In this respect, the manager must draw on their skills as a coach and mentor.

### *Coaching and Mentoring*

Coaching relates primarily to performance development (over the short and long term) in a specific skills area and usually within the current job. The goals are usually set at the suggestion of the coach. The learner has ownership of the goals but the coach has ownership of the process and the provision of feedback.

Coaching is typically done one-on-one or in small groups, and is mostly done on-the-job. It can be practically based e.g. coaching someone how to perform a function in a software program or it can be behaviour based e.g. coaching a person to have more positive customer interactions.

Effective coaches use a high level of questioning to prompt the person being coached to reflect on their own practice and to consider ways of applying new skills/ knowledge.

Mentoring takes a more holistic approach to developing a person than either training or coaching. It is concerned with helping the person grow in a more rounded way. Mentoring is often long term and involves development of the whole person. The goals are set by the learner and the process and the goals are owned by the learner. The mentor helps the mentee develop insights and generate their own feedback.

Coaching and mentoring are essential for teams to perform at their best and it's important for the manager to remember that coaching isn't only about building performance – it's also, about maintaining performance.

### **Managing implementation**

Describe how you currently manage operations on an average day. What areas work well and what could be improved based on our discussions?

## 7. Evaluate the Plan

Once an operational plan has been implemented, regular evaluation is needed so that business leaders can be assured that the plan is working. Where necessary the operational plan will need adjusting. To know what needs improving and how, you need to:

- know what is happening – what ‘working properly’ looks like
- see where things are not working as they should
- investigate the causes of the problem
- make decisions based on valid, reliable and sufficient evidence
- implement the chosen solution.

### *Variation*

A variation is an amendment that changes the original approved plan. Variations may be requested due to factors such as budget overruns or task slippages. Variations should not be used to mask poor performance or serious underlying problems. Instead they should assess potential or actual impacts to:

- Original timeframes.
- Deliverables.
- Resources.
- People.

If the effects are significant, stakeholders may need to be consulted, advised and negotiated with. Stakeholders often change their mind about what must be delivered. Sometimes the business environment changes after the plan starts, so assumptions made at the beginning may no longer be valid. If changes are made, they must be supported by changes in resources.

### *Monitoring budgets*

By keeping close track of your expenditure, you will be in a better position to manage your whole plan budget. It is important that you provide regular reports highlighting any current or potential cost overruns. It is your responsibility to match the actual plan expenditure against the budget.

If you identify any overruns you must consider whether there is any action you can take to bring the plan back on track. Simply reporting the overrun is not enough. Always look ahead and recalculate your budget. You might find that over the duration of the plan the budget will get back on track. A simple method of tracking your budget is to draw a graph of the budgeted expenditure and plot actual expenditure daily or whatever period is appropriate. That way you can spot trends and keep business operations in control.

## Project Management

Project management is the act of defining, planning and coordinating people, tasks and interdependent variables in order to produce a defined change or desired outcome.

It specifically comprises:

- Skills: specialist knowledge and abilities
- Tools: management resources including plans, registers, and templates
- Processes: techniques and approaches.

The phrase 'Management by Projects' refers to the adoption of project management principles as an approach to managing an organisation.

While every project team member contributes to managing a project, the ultimate responsibility lies with a project manager who is accountable for successfully achieving the project objectives.

Being a project manager involves:

- identifying requirements
- establishing clear and achievable objectives
- balancing the competing demands for quality, scope, time and cost
- managing the expectations of various stakeholders
- adapting plans to overcome challenges.



### IMPORTANT

Now go to <https://www.spectraining.edu.au/bsbpmg522> to gain access to:

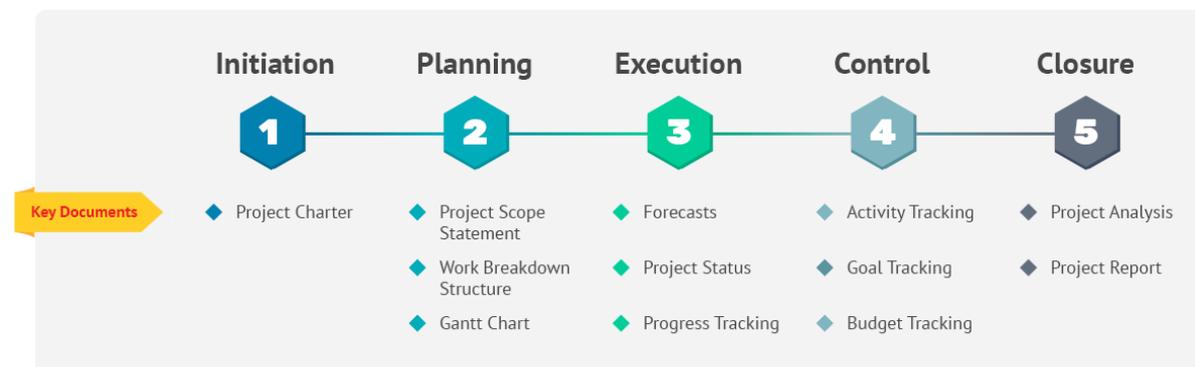
- An Excel template for your Gantt Chart
- Videos outlining project management fundamentals – and where to go for full access.

## Project Lifecycle

It is helpful in understanding projects to think of the project activity from start point to end point as a 'project life cycle'. In simplified terms, some activities are done at the start, some in the middle and some at the end. Of course in real life, projects quickly become more complicated and activities undertaken at the middle or end can necessitate a return to the beginning.

Many organisations develop their own project management framework and expand this basic idea to suit their needs. Many project methods define for us the step-by-step process that must be followed from project start to finish – and some of these can become very complex. The PMBOK® Guide uses the five Process Groups to illustrate the project lifecycle:

- **Initiating** – those processes performed to define a new project or a new phase of an existing project by obtaining authorisation to start the project or phase.
- **Planning** – those processes required to establish the scope of the project, refine the objectives, and define the course of action required to attain the objectives that the project was undertaken to achieve.
- **Executing** – those processes performed to complete the work defined in the project management plan to satisfy the project specifications.
- **Monitoring and Controlling** – those processes required to track, review and regulate the progress and performance of the project; identify any areas in which changes to the plan are required and initiate the corresponding changes.
- **Closing** – those processes performed to finalise all activities across all Process Groups to formally close the project or phase.



## Project Management Approaches

For projects to achieve their objectives they need to be managed and controlled. The skill of managing projects is predicated on a single point of accountability for the project's success – the project manager.

One of the most important aspects of effective project management is the need for rigor; that is, robust processes and procedures and clearly defined management practices to ensure that projects deliver desired outcomes within time and cost constraints to the expected standards. Whilst many organisations/groups follow their own, internally developed processes, many others adopt proven methodologies to deliver projects.

The most commonly used frameworks include:

- **PRINCE2®** (PProjects IN a Controlled Environment v2) – is a methodology developed by and used extensively within the UK and more recently Australia. Increasingly used by organisations across industries, PRINCE2® offers best-practice guidance on managing projects.
- **ISO 21500:2012** – is a collection of concepts and processes considered to form the basis for good practice in project management.
- **Agile Project Management** – is an elaborative methodology developed by and used most widely within the IT industry. Most commonly referred to simply as ‘Agile’, this framework is considered especially effective for projects where the end result can be difficult to define at the project’s commencement.
- **PMBok** – is the Project Management Institute’s Project Management Body of Knowledge® which provides a lifecycle approach that can apply equally well to projects of all sizes and complexities. PMBoK focuses on practical tools and techniques for managing projects and draws on the strengths of other frameworks to provide best-practice guidance in project management.

<b>Purpose</b>	Why is the project being consiered?
<b>Context</b>	Under what conditions will the purpose be met?
<b>Objectives</b>	What will the project deliver
<b>Name</b>	What will the project be called
<b>Stakeholders</b>	Who has an interest or will be impacted by the project?
<b>High level plan</b>	Who? What? When? Where? How?

## Initiate

The idea for a project often originates from an organisation’s strategic plan. However, projects may also be initiated by individuals or groups with an idea for improving work methods, customer experience or in response to external shifts in the marketplace. The aim of this first stage of the project lifecycle is to define the project to determine whether the idea is worth pursuing. The key questions at this stage are:

### *Project Proposal or Business Case*

Processes for initiating a project will differ from organisation to organisation. Many compile the key information into a ‘project proposal’ or business case. Similar to an individual using a resume to secure a job, the proposal paper is the mechanism by which a project secures funding and is able to progress towards planning.

Your proposal must at least cover the following:

- context: alignment to business plan, strategic plan
- value proposition: benefits (often contains a feasibility analysis) balanced with risks
- focus: the problem and the recommended solution
- deliverables: the objectives and the tangible outcomes of the project
- schedule: a simple breakdown of what will be required over time to achieve the objectives
- required resources: estimated budget, resources, project team requirements
- summary and recommendation.

As any project will require investment, it is essential at the proposal stage to identify the project's sponsor. This is the person (sometimes group) who provides resources and support for the project and is accountable for the project's ultimate success. The sponsor leads the initiation of the project and is involved in authorising changes to the project. Depending on the size of the project there may be multiple points at which the sponsor reviews project progress before approving the project's next stages.

### **Project Scope**

After a thorough analysis of the project initiative you will be ready to scope out the project, i.e. apply the boundaries around the project that will ensure its success. The purpose of scoping is to outline what will be required to manage the project and ensure that it is approved by all of the relevant parties.

The project scope brings together information from stakeholders and ensures their expectations for the project are clarified and articulated (and any conflicts resolved) before the project work commences.

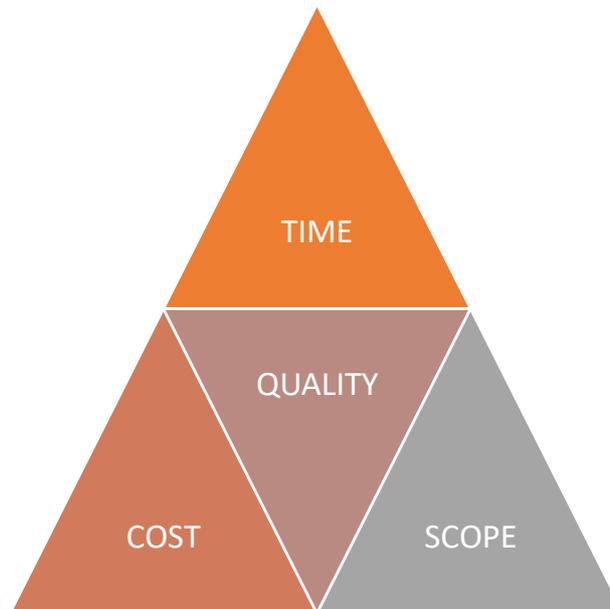
### **Inclusions, Exclusions and Assumptions**

We need to define the boundary of responsibility of the project by defining exactly what the project is designed to achieve. It provides everyone involved with a clear understanding of the inclusions, exclusions and assumptions. Take the example of a brand relaunch. With this project we might determine the following:

- **Inclusion** – contracting of a creative agency to design the new brand according to project specifications.
- **Exclusion** – the new brand will be applied to new product lines only – existing products will carry the original brand until sold out.
- **Assumption** – once the brand has been relaunched there will be no further investment in or changes to the brand for a minimum five years.

### The Triangle of Triple Constraints

The 'Triangle of Triple Constraints' refers to the nature of all projects. You cannot change the budget, schedule or scope of the project without affecting the other two parts. Quality is a constant in projects and is defined within the project. By adjusting the three constraints you will change the project quality.



### Research Activity

Take 5 minutes to go online and research the types of documents used in a typical project. List them below and discuss which ones you are familiar with, and the role of some of the other documents you have found. (*hint, Google "Project documentation"*)

## Project Objectives

The project's objectives drive the rest of the project planning process. What do you want to achieve?

A SMARTT objective must be:

- **Specific** - Make it specific. What exactly do you want to achieve?
- **Measurable** - Put a figure on it. How many? How much? How often? How big?
- **Achievable** - Make sure that you and the team can do what you are aiming for.
- **Relevant** - Is the objective relevant to the business, the department, the team?
- **Time-bound** - When do you want to achieve this? Next week? This quarter? This financial year?
- **Trackable** - Can you follow progress towards your objective?

## Business Fit

One of the most important considerations when determining your project's objective is to articulate how they fit with broader business goals and issues. While the project itself will have SMARTT objectives, you need to understand the project's impact in broader terms. Imagine for example that an organisation initiates a project to reinvigorate its image in the marketplace by developing a new brand identity. The main project will be the brand development and launch however the impact (if the project is successful) will create an increased customer base and company revenues.

In this respect, a brand relaunch objective might be:

*'To develop a brand image and messaging that attracts 15% market share of the male, 18-25 year old demographic in the [X] product category within six months.'*

This in turn could be linked to an organisational goal such as:

*'To increase [X] product category revenues by 10% year-on-year over the next three years.'*



## Project Stakeholders

### *Identifying stakeholders*

Stakeholders are persons, groups, or organisations that affect – or can be affected by – your project. This includes customers, managers, suppliers and other employees. They are the people who will judge the success or failure of the project. It is important to identify in advance who your stakeholders are and how the interdependencies will affect your team.

It's also important to consider the relative extent to which stakeholders are interested in or affected by your project. Take the example of a company brand relaunch. Although this project has objectives around attracting new market share, what about the existing market? How will they react to the change of brand identity? Will they embrace it or feel alienated by it? Could the project actually result in loss of business?

With these questions in mind, it's clear that existing customers and clients are important stakeholders to consult during this project.

### *Managing stakeholders*

Once you have identified the stakeholders, you need to determine exactly what the success of your project means for them. Because stakeholders' interests vary, their definitions are likely to differ. One of your critical tasks in this phase is to meld stakeholders' expectations into a coherent and manageable set of objectives.

Frequent interaction with your stakeholder groups ensures that all required information is available, and that goals, activities and performance criteria are aligned at all levels.

## Planning the Project

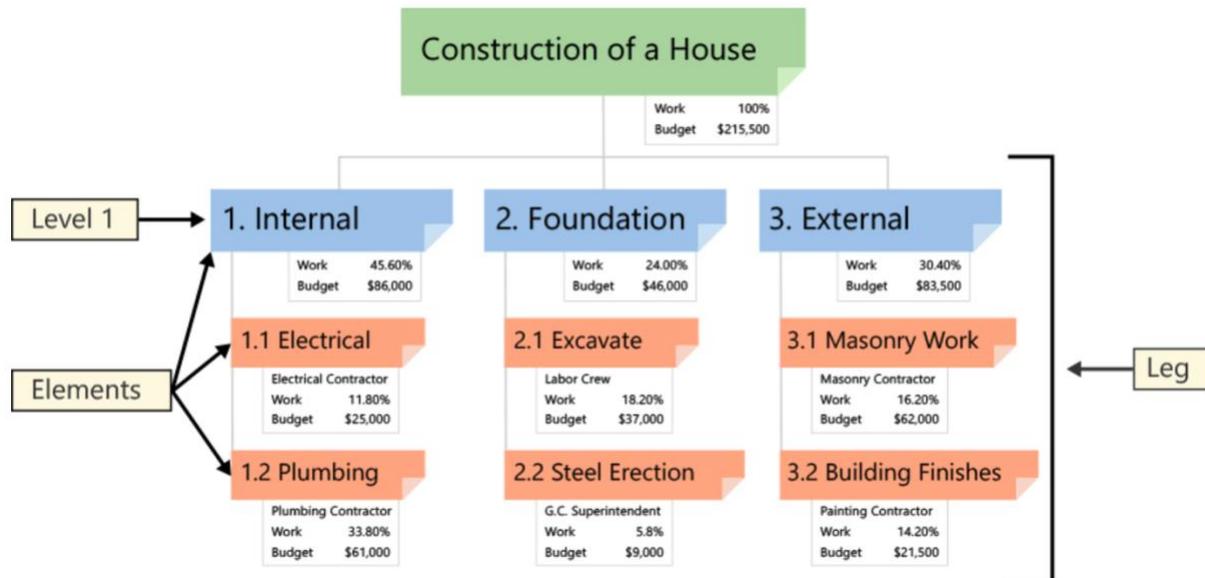
Now that you have developed the big picture during the initiation stage, the planning stage is where you create the detail. Project planning clearly defines what the project is going to do, when, how long it will take and who will be involved. The aim is to establish an outline which can be used in the execution stage to coordinate the various interdependent tasks and ensure the objectives are achieved in a timely and effective manner.

### **Work Breakdown Structure**

The work breakdown structure (WBS) is a visual list of the tasks and sub-tasks necessary to complete the project. While the process of creating a work breakdown structure is relatively simple, it is a vital planning step. By defining the scope into manageable chunks, the project team can accurately determine the time and resources required and develop the project schedule. It also helps to ensure the team understands what work is expected of them.

Once the key tasks have been identified, you need to brainstorm the sub-tasks required to complete each key step. Once you have all the tasks, you need to sequence them – that is, put them in some logical order.

A simplified WBS for the construction of a house might look something like this:



### Scheduling

For each of the tasks in a WBS, an estimate of time required to complete each task, along with starting and finish times will allow the development of a schedule. Estimating the time required to undertake each task can be difficult and, again, will require input from project team members and possibly others with some expert knowledge. In some cases, by assigning a time estimate, we are actually planning the amount of time being allocated to the task. The tasks in the project may be dependent on each other. That is, one task may need to be completed before the next can begin. In this relationship, we can say that the second task is dependent on the first being finished.

A project schedule for an IT implementation project might look something like this.

All	Task Name	Duration	Assigned	Percent Complete	Priority	Baseline Start Date	Baseline Finish Date	Planned Start Date	Planned Finis
25	Bug 1	1 day	Jeremy Walber	100%	High	7/7/2020	7/7/2020	7/7/2020	7/7/2020
26	Bug 2	1 day	Jeff Reeson	25%	High	7/7/2020	7/7/2020	7/7/2020	7/7/2020
27	Correct Issues Found	3 days	Mark Smith,Bra	25%	Medium	10/5/2020	10/7/2020	10/5/2020	10/7/2020
28	Testing Complete	0 days		75%	Medium	10/7/2020	10/7/2020	10/7/2020	10/7/2020
29	<b>5. Implementation</b>	<b>53 days</b>		<b>65%</b>	<b>Medium</b>	<b>10/8/2020</b>	<b>12/21/2020</b>	<b>10/8/2020</b>	<b>12/21/2020</b>
30	On-Site Installation	17 days	Jessica Simp	50%	Medium	10/8/2020	10/30/2020	10/8/2020	10/30/2020
31	Setup Database	3 days	Jessica Simp	25%	Very High	10/30/2020	11/4/2020	10/30/2020	11/4/2020
32	Import Live Data	28 days		75%	Medium	11/4/2020	12/14/2020	11/4/2020	12/14/2020
33	Integrate Desktop	3 days		75%	Medium	12/14/2020	12/17/2020	12/14/2020	12/17/2020
34	Implementation Complete	3 days		100%	Medium	12/17/2020	12/21/2020	12/17/2020	12/21/2020
35	<b>6. Training</b>	<b>37 days</b>		<b>87%</b>	<b>Medium</b>	<b>10/30/2020</b>	<b>12/21/2020</b>	<b>10/30/2020</b>	<b>12/21/2020</b>
36	Train Administrators	3 days		75%	Medium	10/30/2020	11/4/2020	10/30/2020	11/4/2020
37	Train Users	3 days		100%	Medium	11/4/2020	11/9/2020	11/4/2020	11/9/2020
38	Training Complete	0 days	Eric Vasquez	50%	Medium	12/21/2020	12/21/2020	12/21/2020	12/21/2020
39	<b>7. Documentation</b>	<b>20 days</b>		<b>43%</b>	<b>Medium</b>	<b>12/22/2020</b>	<b>1/18/2021</b>	<b>12/22/2020</b>	<b>1/18/2021</b>
40	Technical Documentation	15 days	Jennifer Jurewi	50%	Medium	12/22/2020	1/11/2021	12/22/2020	1/11/2021
41	User Documentation	5 days	Jennifer Jurewi	25%	Low	1/12/2021	1/18/2021	1/12/2021	1/18/2021
42	Project Complete	0 days	Jennifer Jurewi	75%	Medium	1/18/2021	1/18/2021	1/18/2021	1/18/2021
43									
44									

Source projectmanager.com

### Preparing a Gantt chart

A Gantt chart is a clear and unambiguous pictorial representation of the project plan. It illustrates tasks over time by using a horizontal time scale, a vertical list of activities, and a horizontal line or bar for each task. The length of the bar indicates the duration of each task or milestone. Different types of bars can be used to represent different tasks.

There are a number of applications you can use to help with scheduling. The following example for the brand relaunch project has been created using SmartSheet.

**Reminder:** Go to <https://www.spectraining.edu.au/bsbpmg522> to access an Excel template for your Gantt Chart and a template for a WBS.

# PROJECT TITLE

SIMPLE GANTT CHART by Vertex42.com

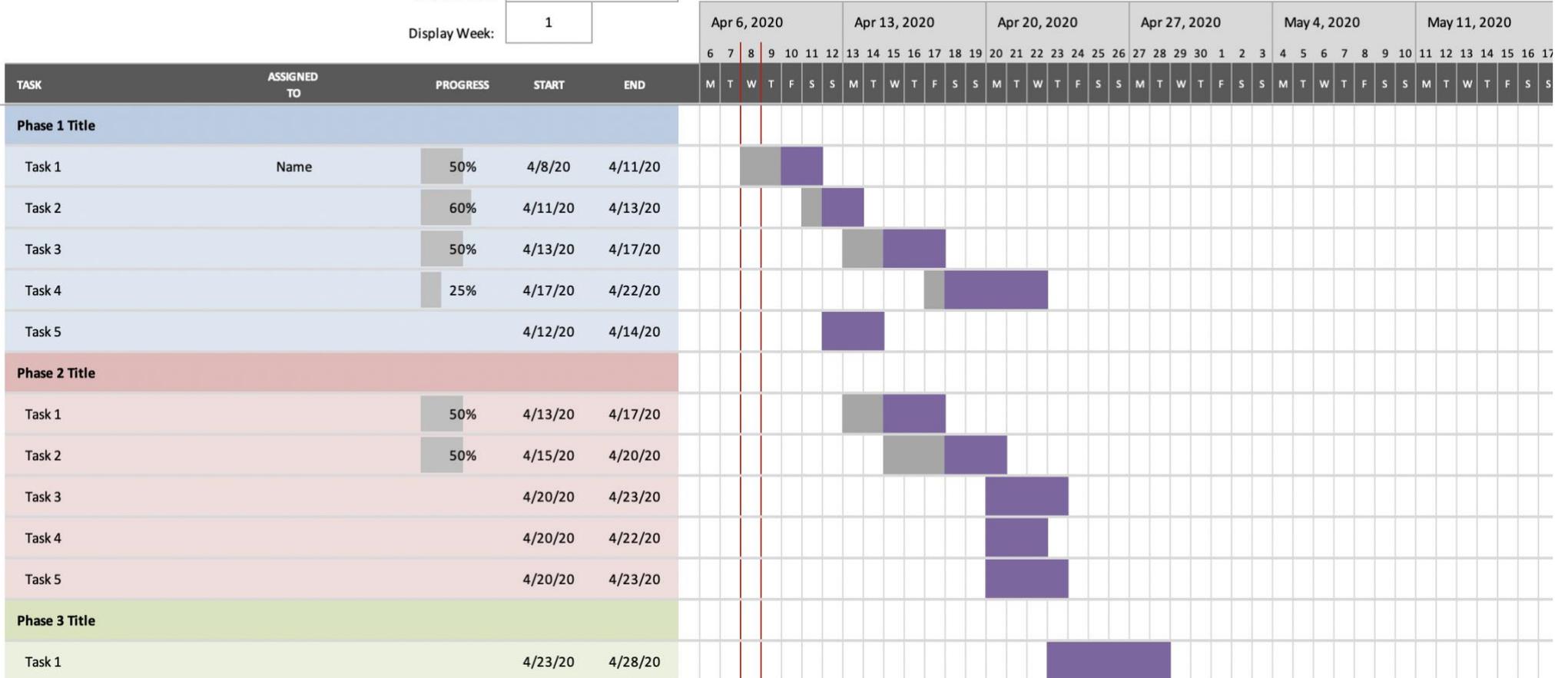
<https://www.vertex42.com/ExcelTemplates/simple-gantt-chart.html>

Company Name

Project Lead

Project Start:

Display Week:



## Project Budget

During the planning stage of a project, a detailed project budget should be developed that reflects the resources required to complete the activities and tasks of the project. The WBS provides the structure to prepare the project budget, based on resource cost estimates, for each of the project tasks. This ensures that funds spent on the project are always focused on achieving the project deliverables and objectives.

The term 'project budget' is also referred to as a cost baseline in the same way an approved schedule can be a baseline, that is, approved by the project sponsor/customer to proceed. Behind the development of the project budget is the need to identify the resources required. The types of resources will vary depending on the type of project, but usually include:

- human resources (labour)
- equipment, machinery, tools
- services (electricity, communications, etc.)
- facilities (premises)
- fees, charges, licences.

These resource categories can also be divided into:

Direct expenses	Indirect expenses
Any costs that are incurred specifically for a sponsored project in order to do the work of the project, such as for contractors, consultants and equipment hire.	Those costs that are incurred for common or joint objectives and therefore cannot be identified readily and specifically with a particular sponsored project.  Example: services of the accounting staff, salaries of personnel engaged in a broad range of support activities, office supplies, telecommunications and overheads.

## Contingency

Make an allowance for unforeseen circumstances. This is usually determined by the level of risk the project is carrying. A typical contingency budget is up to 15% of the project's value.

## Project Team Roles

In the same way that managers might find themselves juggling several projects simultaneously, chances are that some or all of the project team members are also involved in other work. What this means for the project manager is that they need to be aware of and address conflicting objectives and priorities.

While some projects will involve a dedicated team from start to finish, the more likely scenario is that team members will come and go as needed within the project schedule. Keeping track of who is doing what, when and why is essential. It's also vital that contributing team members understand their specific roles, tasks and desired outcomes. While the project manager shouldn't aim to micro-manage, it is important to have regular dialogue with individuals and the team as a whole. Also give consideration to your role as the project manager. In the same way that the project has boundaries, you also need to be clear on what you take on personally versus those activities to be undertaken by others. Depending on the type and scope of the project, should you be hands-on playing an instrument, or should you be more like the conductor of the orchestra?

## Project Communication

A communications plan is an essential tool used to capture the required information for stakeholder needs and the planned communication processes.

The key questions to ask are:

- who (stakeholder)
- what (sensitivities, needs)
- when (frequency, timing)
- how (medium).

In the example of the workplace dining facility project, we can analyse the communications as follows:

<b>WHO</b>	While the main audience for project communications will be the sponsor/client, those with equal interest will be the employees who will use the finished facility. Other stakeholders could include the construction team, kitchen supply companies and tradespersons.
<b>WHAT</b>	The sort of information that may be needed includes: <ul style="list-style-type: none"><li>• details of the facility design</li><li>• expected delivery dates and milestones</li><li>• changes to gas and electricity services</li><li>• planned disruption times etc.</li></ul>
<b>WHEN</b>	We would need to make sure information is provided in a timely manner so that stakeholders can plan and act according to our project plan. For example, making other arrangement for meals during construction, being on site at agreed dates, delivering material at the right time and place.
<b>HOW</b>	What is the best way to provide this information? While verbal communication is used regularly, it should be backed up with plans, design and other documentation in either hard copy or electronic format.

Communications plans can be organised by method, as a matrix, or audience. See examples below:

### Simple Matrix

Communication	Method	Frequency	Goal	Owner	Audience
Project status report	Email	Weekly	Review project status and discuss potential issues or delays	Project manager	Project team + project sponsor
Team standup	Meeting	Daily	Discuss what each team member did yesterday, what they'll do today, and any blockers	Project manager	Project team
Project review	Meeting	At milestones	Present project deliverables, gather feedback, and discuss next steps	Project manager	Project team + project sponsor
Post-mortem meeting	Meeting	At end of project	Assess what worked and what did not work and discuss actionable takeaways	Project manager	Project team
Task progress updates	TeamGantt	Daily	Share daily progress made on project tasks	Project manager	Project team

### By Method

Communication	Frequency	Goal	Owner	Audience
<b>Email</b>				
Project status report	Weekly	Review project status and discuss potential issues or delays	Project manager	Project team + project sponsor
<b>Meetings</b>				
Team standup	Daily	Discuss what each team member did yesterday, what they'll do today, and any blockers	Project manager	Project team
Project review	At milestones	Present project deliverables, gather feedback, and discuss next steps	Project manager	Project team + project sponsor
Post-mortem meeting	At end of project	Assess what worked and what did not work and discuss actionable takeaways	Project manager	Project team
<b>TeamGantt</b>				
Task progress updates	Daily	Share daily progress made on project tasks	Project manager	Project team

### By Audience

Communication	Frequency	Goal	Owner
<b>Project team</b>			
Project status report	Weekly	Review project status and discuss potential issues or delays	Project manager
Team standup	Daily	Discuss what each team member did yesterday, what they'll do today, and any blockers	Project manager
Task progress updates	Daily	Share daily progress made on project tasks	Project manager
Project review	At milestones	Present project deliverables, gather feedback, and discuss next steps	Project manager
Post-mortem meeting	At end of project	Assess what worked and what did not work and discuss actionable takeaways	Project manager
<b>Project sponsor</b>			
Project status report	Weekly	Review project status and discuss potential issues or delays	Project manager
Project review	At milestones	Present project deliverables, gather feedback, and discuss next steps	Project manager

## Project Risk

Analysing where things can go wrong is an important part of the planning process. It enables you to put in place actions to prevent the risk from occurring (mitigation) and to plan what action to take if a risk occurs (contingency).

Planning for the effective management of risks involves assessing the risk and planning control mechanisms to eliminate or reduce the impact of each risk.

Once you have identified the risks, the risk rating allocated will be based on an assessment of the likelihood of risk occurrence and its potential impact (consequence). For consistency across the organisation, ratings should be based on a matrix along the following lines.

	Consequence				
Likelihood	Insignificant	Minor	Moderate	Major	Critical
Rare	LOW Accept the risk Routine management	LOW Accept the risk Routine management	LOW Accept the risk Routine management	MEDIUM Specific responsibility and treatment	HIGH Quarterly senior management review
Unlikely	LOW Accept the risk Routine management	LOW Accept the risk Routine management	MEDIUM Specific responsibility and treatment	MEDIUM Specific responsibility and treatment	HIGH Quarterly senior management review
Possible	LOW Accept the risk Routine management	MEDIUM Specific responsibility and treatment	MEDIUM Specific responsibility and treatment	HIGH Quarterly senior management review	HIGH Quarterly senior management review
Likely	MEDIUM Specific responsibility and treatment	MEDIUM Specific responsibility and treatment	HIGH Quarterly senior management review	HIGH Quarterly senior management review	EXTREME Monthly senior management review
Almost certain	MEDIUM Specific responsibility and treatment	MEDIUM Specific responsibility and treatment	HIGH Quarterly senior management review	EXTREME Monthly senior management review	EXTREME Monthly senior management review

### Risk Treatment

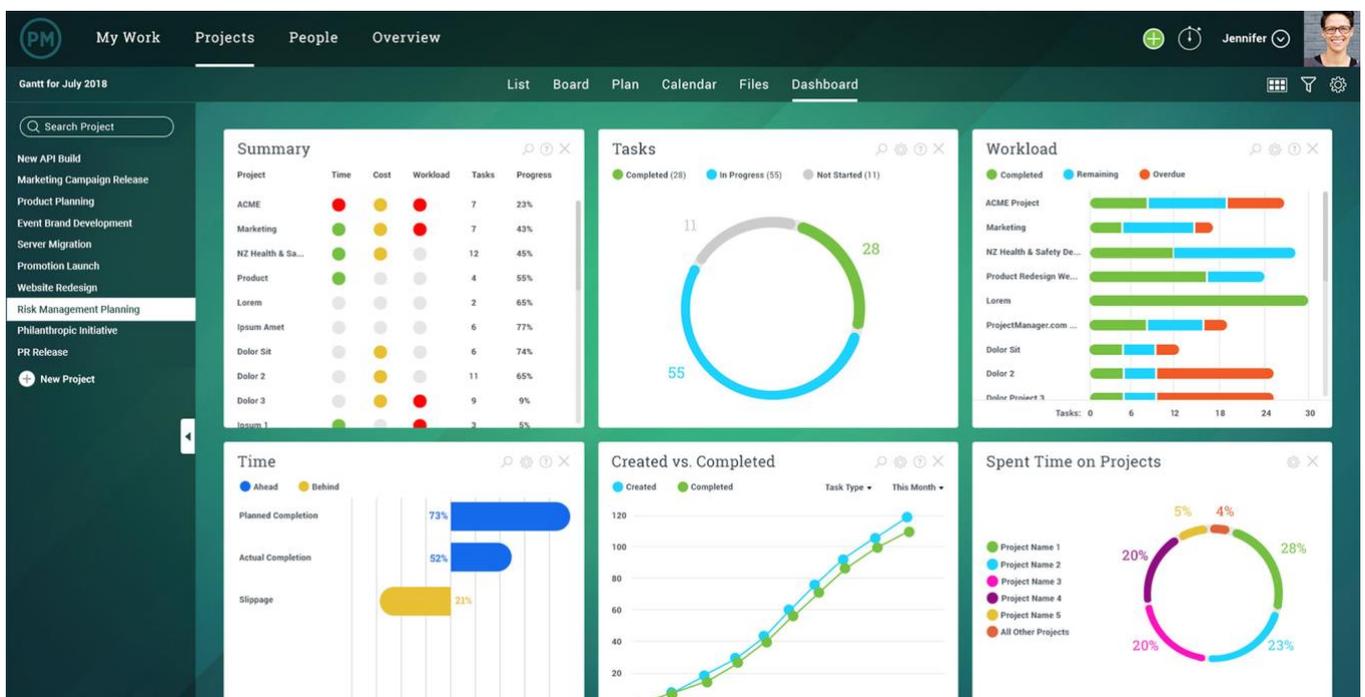
Risk treatments are normally classified against the following possibilities (or a combination thereof):

<b>Avoid</b>	Review and replan the project to avoid the risk.
<b>Mitigate/Reduce</b>	Action can be taken to reduce the likelihood or potential consequence of a risk occurring.
<b>Transfer/Share</b>	Transferring or sharing a risk means another party is willing to accept some of the consequence. For example, buying insurance or contracting out services / liabilities.
<b>Accept</b>	Means that although the risk is identified and acknowledged, the project will proceed without making any changes.

### Risk monitoring, controlling and reporting

When the project risks and appropriate controls are put in place, the project can go ahead with the confidence that the majority of foreseeable contingencies are managed. This, however, must continue throughout the project and be regularly analysed to ensure any new risks are identified and controlled.

A Risk Register may be used to record and monitor all existing and new risks throughout the project. Below is an example from a popular cloud-based PM tool – ProjectManager.com. You can see how risks can be monitored easily from the project dashboard.



## Execute and Monitor

Executing refers to putting into action the processes needed to complete the work in the project plan. This is the time where you implement all of the plans, schedules, procedures and processes that were prepared and anticipated during prior phases. Generally the longest phase of the project, executing involves coordinating people and resources to ensure tasks are completed according to objectives.

### Project Monitoring

Monitoring is the process of observing the execution of the project so that progress can be managed and potential problems can be identified and corrected when necessary. It is important to take a proactive approach to monitoring so that changes and variances are detected early, enabling you to take optimal action. Review status indicators frequently and seek regular feedback from your team and from key stakeholders.

### Project Performance Reporting

Records, information and data generated by projects can be contained in regular project performance reports, which are a required form of communication between stakeholders. Reports can be within defined formats or generated by team members depending on the needs of the project. Examples include:

- timely status reports on progress
- traffic light reports [a status report that highlights issues based on green (OK), yellow (potential/emerging problem) or red (urgent)]
- risks and/or issues register
- change requests/control report
- contract status reports
- regular budget reports.

In some projects, all these items are condensed into an overall regular project update report and different levels of information are provided for different stakeholder groups.

#### Activity: Project monitoring

Monitoring aspect	Methods	Frequency

## Managing Variations

At times the project may face external changes or unplanned events which prompt significant changes to the project. It is important to actively manage these variations to ensure the project is able to deliver the required outcomes.

It is critically important to keep the project on track. Unanticipated events and situations will inevitably be encountered and some scheduling may need to be altered.

Evaluate the impact across all factors of the project including:

<b>Risk</b>	Will the variation increase the project risks?
<b>Quality</b>	Will the variation impact the quality of the project?
<b>Estimates</b>	How will the variation affect existing estimations?
<b>Schedule</b>	What impact will the variation have on the schedule?
<b>Outcomes</b>	What impact will the variation have on the project deliverables?
<b>Benefits</b>	Will the variation impact the benefits of the project outcomes?
<b>Costs</b>	How will this affect costs?

Where necessary, seek confirmation (approval) that the variation should result in a permanent change to the project. Communicate the findings of the evaluation process to the critical and essential stakeholders to determine whether the change should go ahead. If so, adjust the plans and execute accordingly.

## Close

Project review and closure is the final process for the project and is used by senior management to assess the success of the project, inform future projects, 'tidy up' any loose ends and formally close the project. This is the stage at which you check that:

- you have done everything that has been planned
- the client is satisfied with the deliverables
- project objectives have been achieved
- lessons have been captured for your organisation.

This is the opportunity to celebrate success and reward performance, as well as being the opportunity to review what went well and what needs improvement. You also need to finalise recording and documenting all aspects of the project.

It is important to get the client to sign off on the project – not only to say they are satisfied with the result but that they agree the project is completed. This is also a time to manage the breakup of the project team and their return to their normal work functions.

### *Final report*

Every project should be closed with a final report which may include a presentation to the main stakeholders. This report can contain many different aspects but will normally cover:

- formal completion
- outcomes and deliverables
- financial report
- termination of contracts
- lessons learned
- document archiving.

### Activity: Project close

Consider your own workplace context and the projects. For the following aspects of a project, what will you need to do in regards to each to close the project?

Project aspect	What do you need to do?
Project team	
Stakeholders	
Legal	
Contractors	
Suppliers	
Equipment	
Project deliverables	

## Project Evaluation and Lessons Learned

The final step in finishing your project involves conducting a comprehensive review to assess the project so that you can determine what went well along with what could have been done better. From this review you can develop a lessons learnt report that will help others when formulating new projects. Importantly, you need to find ways of making your lessons available to the wider organisational community.

This is important as many seemingly unrelated projects can face the same challenges and encounter the same failures – by learning from your own and others' project experiences, you can hope to achieve more consistently positive project outcomes for the future. Here are just some of the questions you need to ask when evaluating your projects:

- Planning – how well was the project planned? Was the scope planning effective?
- Were risks adequately identified? Were contingency plans effective?
- Organising – did the overall project come together well?
- Executing – were there schedule delays and if so, why?
- Directing – how well did the project manager direct the project?
- Controlling – how well did success metrics perform and did they meet expectations?
- Budget – did the project stay within budget?
- Were quality requirements met?
- Were project communications effective, reliable and valid?
- Did the project team work well together?
- Were there unresolved conflicts?
- Were all external compliance requirements met?
- What feedback was received on the project (positive and negative aspects)?

### Discussion: Project evaluation and lessons learned

What mechanisms do you or could you put in place to ensure that knowledge and experience gained through projects is shared throughout your organisation?

## From Project to Business as Usual

For projects that are aimed at driving organisational change for the long term, once the project phase is completed and reviewed, the activity doesn't stop but it does change focus. The responsibility of the leader is now to support the transition from project to Business As Usual (BAU).

This can involve:

- transitioning and supporting team members
- measuring the operational performance
- applying controls
- seeking feedback.

### *Transition and Support Team Members*

As a project transitions into Business as Usual the roles and responsibilities of team members will need to be examined. Potential scenarios for team members include:

- engaging in the new operational roles created by the project
- resuming substantive positions
- redeploying into new roles in other parts of the business
- moving onto the next project
- leaving the organisation e.g. contractors

A key to helping people successfully transition out of a project is to involve them in the decision making. Ask them what skills/ knowledge/ experience they have gained and what they would like to do next. Invite them to consider new possibilities and (as far as is practicable) to shape their own destiny.

For those team members that are engaged in operational roles there will be many opportunities to train, coach and mentor them. It is important to know the differences between the functions and how to make the best use of what you do.

### *Celebrating Success*

Projects often require people to put in 'over and above' their normal workload - sometimes for significant periods of time. They test people's capabilities and stretch their personal resources. Good project management celebrates the success of the project and acknowledges the efforts of all those involved.

### **Activity: Success**

How would you celebrate the completion of a project?

## Successfully Manage Meetings

The majority of business is conducted between people, so there is the ongoing need for people to meet and discuss ideas, develop strategies, resolve problems and more. While the workplace meeting can be the source of disquiet among many workers as they often don't achieve what they set out to achieve during the meeting, successfully managing meetings is not only a time saving practice, but a performance enhancing practice for you and your team.

An effective meeting checklist:

Before:

- Do you have an agenda?
- Have you verified the requirements with all stakeholders?
- Have you contacted all attendees and received acknowledgements?

During:

- Is the meeting conducted ethically and fairly?
- Has everyone been involved in the meeting?
- Has there been an accurate record of the proceedings?

After:

- Have the minutes or notes been reviewed?
- Have you distributed the follow up tasks or outcomes to the key stakeholders?
- Have the meetings outcomes been reported (if necessary)?

### The meeting's purpose

As straightforward as this sounds, if you asked somebody what the purpose of their meeting is, most could not answer you succinctly or even correctly. The reason is, that the purpose of the meeting must be directly connected with the outcomes expected from the meeting, not simply the topics that will be raised.

For example;

*Tom wishes to inform his staff of an upcoming change to their pay system. Before he does that, he wants to hold a meeting with key managers to ensure they are fully aware of the changes and how to manage any expectations of their direct reports.*

*Therefore, the purpose of Tom's meeting is... **Communicate enough detail about the new pay system to key managers to effectively communicate with their staff.***

#### Activity: The purpose

Consider an upcoming meeting you plan to hold or attend. Write down a succinct purpose below and read it back to ensure you've captured the real intent of the meeting.

## The agenda

In the digital age, agenda's can assume a variety of appearances, from a task list in your scheduling software, through to a pop-up list in a mobile scheduling app. Despite the medium being used, an effective agenda should cover the following:

These eight tips will help you to build a great meeting agenda:

1. **Seek input from team members and select topics that affect the entire team**  
The more ownership people have in the meeting, the more actively they will participate.
2. **Leverage collaboration platforms like Microsoft Teams, Zoom, or Adobe Connect to discuss items in advance**  
Discussing topics in advance allows you to focus more of your time together on making decisions.
3. **Assign an owner for each agenda item**  
The topic owner provides materials in advance and directs conversation in the meeting.
4. **Set the purpose of each agenda topic – is it for information, discussion or decision?**  
The topic purpose tells attendees how they can participate effectively.
5. **Ask questions**  
Include questions to help participants think through agenda topics and come prepared with their thoughts and follow-up questions.
6. **Ensure each topic is clear and includes supporting information**  
Bullet lists don't give attendees enough information to prepare for a meeting. A strong agenda includes details and links to relevant documents.
7. **Allocate a realistic amount of time for each topic**  
Most meeting organisers underestimate the amount of time needed to get through an agenda. Calculate the time to introduce a topic, answer questions, resolve discussions and agree on next steps.
8. **Share the agenda at least 24 hours in advance**  
Meeting participants need enough time to review materials in order to be prepared for good discussions that lead to great decisions. The ideal time frame for sharing the agenda will vary based on the content, meeting length and importance of the meeting.

Source: [meetingdecisions.com](https://meetingdecisions.com)

### Activity: Create an Agenda

Using your scheduling tool or word processor app of choice (MS Outlook, Word or other), create an agenda for a meeting you plan to undertake in the next few weeks. If you don't have any meetings planned, create a fictional scenario to complete this activity.

### Communicating the meeting to the right people

One very important rule for holding a meeting is: ‘don’t invite someone who does not *need* to be there’. Having a complete list of those who need to have attend is an important step towards having an effective meeting. One simple test is to ask yourself:

*“Does this person have ideas or other input that is important to the subject of the meeting?”*

If the answer is yes, then they should, if possible, be invited to attend. Alternately by asking:

*“Does this person need to know the information from the meeting?”*, then you may have to decide whether it is better that they attend, or simply receive the notes from the meeting at a later stage.

### Case Study Activity

Jane wanted to organise a meeting to discuss the training needs of her company’s new manufacturing facility. The purpose was to ensure that only people who needed upskilling were allocated the resources to undertake the training.

When she reviewed the key stakeholders Jane decided to invite the following people to the meeting:

- The site foreperson – this person was responsible for managing the 15 staff at the facility
- The production manager – this person was in charge of production operations
- HR manager – this person was responsible for approving the training budget and organising training resources

Who else should Jane consider from the list below, and why?

- Union representative
- Staff from the new operation
- Company training manager
- External training consultant

### What to communicate

Given the speed with which documentation can be sent throughout an organisation, there is ample time to prepare and send the appropriate information to each key stakeholder who is to attend the meeting. An example of the sorts of documentation that might be sent prior to a meeting includes:

- the agenda
- background information on the topic to be discussed
- copies of a presentation if appropriate
- links to important information and data
- a calendar invitation

Depending on the meeting topic, it may also be prudent to only send the necessary information to the specific attendee, rather than all the documentation that may be required at the meeting. This is to help ensure that the information is acted upon, or researched adequately prior to the meeting.

### Conducting a great meeting

Preparation is the key to a quality meeting and effective outcomes. With this in mind, it is important to book the location (if necessary) and create the right atmosphere for open and honest discussion. If the meeting is to be held virtually, try to ensure all participants are in a quiet area where there are unlikely to be disturbed. And that they have good access to the technology, including a stable network connection.

### Using your people skills

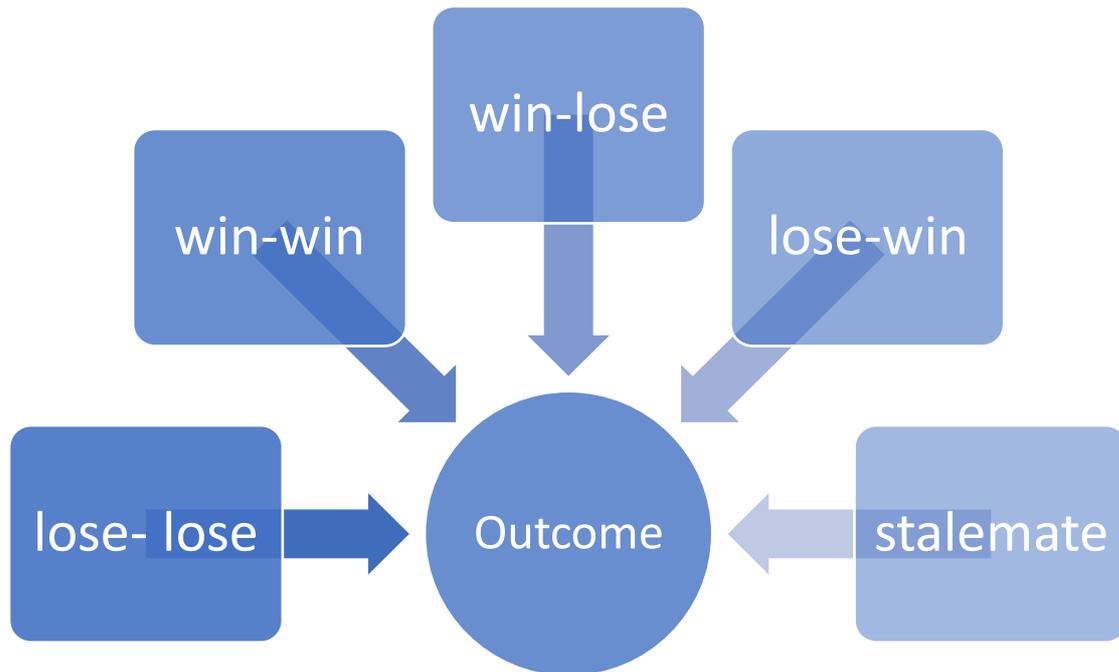
No meeting can survive poor communication skills or unnecessary conflict. As the manager of the meeting, your role is to moderate any potential barriers and foster an open environment where all participants can have their input. This will include:

- Promoting participation. This can be done by following the timing of the agenda, and/or through the skillful re-direction of input between attendees. This requires a calm and assertive demeanour.
- Foster discussion. Topics raised at a meeting will generally require discussion. Using open questions will usually result in a number of attendees wishing to air their opinions or points of view. This is when your facilitation skills will be required to ensure no one hijacks the meeting and everyone's views are tabled.
- Problem-solving. Where issues require a solution, consider using problem solving techniques or tools to ensure a fair and time-appropriate discussion. These tools are discussed in the next section.
- Resolution of issues. This can be done in a variety of ways such as a vote, a secret ballot, a nominated decision-maker or on the balance of evidence. Which ever approach you use, it should be appropriate to your organisations normal procedures and policies so as to provide leadership as a company representative.

## Negotiating

Negotiation is the primary way in which people come to an agreement. The skill of effective negotiation is complex and ultimately depends on your influential communication skills. We might hope that when we adopt effective negotiation strategies—such as spending lots of time preparing and asking questions at the table—we would achieve consistently strong results in our negotiations. Yet as most of us have experienced, our outcomes can vary a great deal from one negotiation to the next.

There are several possible outcomes to any negotiation:



## Discussion

What was your last major negotiation? What was the outcome? What could you have done differently to change the outcome?

The goal of any negotiation, especially in the context of a time-constrained meeting, is to arrive at a win-win, or to postpone the negotiation until time is available to adequately prepare (on both sides). A lack of preparation by one side severely undermines their ability to 'win' at the negotiation table. While this might be preferable for someone who is prepared, the risk to the relationship is often more important than a 'win at all costs' approach.

Harvard Law School's, Program on Negotiation (PON), has published 5 win win negotiation strategies. They are:

### **1. Win-win negotiation strategy #1: Make multiple offers simultaneously.**

When you put only one offer on the table at a time, you will learn very little if the other party turns it down. By contrast, think about what happens when you simultaneously present multiple offers, each of which is equally valuable to you. If the other side refuses all of your offers, ask them which one they like best. Their preference for a specific offer should give you a strong clue about where you might find value-creating, win-win trades and generate mutual gain. In addition to identifying potential win-win moves, when you make multiple offers simultaneously, you signal your accommodating and flexible nature, as well as your desire to understand the other party's preferences and needs.

### **2. Win-win negotiation strategy #2: Include a matching right.**

In negotiation, including a matching right in your contract (a guarantee that one side can match any offer that the other side later receives) can be a classic win-win move. Imagine that you're a landlord negotiating with a prospective tenant. You want to keep the ability to sell the apartment to someone else in the future, while the prospective tenant wants a commitment to rent the apartment for as long as they want. Offering the tenant a matching right—the power to match any legitimate third-party offer—would allow you to preserve your own flexibility while giving the tenant the opportunity to avoid the disruption of a move.

### **3. Win-win negotiation strategy #3: Try a contingent agreement.**

Parties often reach an impasse because they have different beliefs about the likelihood of future events. You might be convinced that you will deliver a project on time and under budget, for example, but the client may view your proposal as unrealistic. In such situations, a contingent agreement—negotiated "if, then" promises aimed at reducing risk about future uncertainty—offers a way for parties to agree to disagree while still moving forward. Contingent commitments often create incentives for compliance or penalties for noncompliance. You might propose paying specified penalties for turning your project in late or agree to significantly lower your rates if you go over budget, for example. A contingent agreement can greatly increase your odds of being satisfied with whatever remedies are in place.

#### **4. Win-win negotiation strategy #4: Negotiate damages upfront.**

Negotiating upfront exactly how much will be paid for each late or missed delivery, for example, may streamline any alternative dispute-resolution measures or lawsuits that arise. In addition, negotiating damages puts a new issue on the table—and thus expands the potential for value creation. In this manner, adding new issues to the mix increases the opportunity for win-win negotiations.

#### **5. Win-win negotiation strategy #5: Search for post-settlement settlements.**

Imagine that you've just reached an agreement. You are fairly happy with the deal, but suspect you could have eked more value out of it. According to conventional wisdom, you should quit talking about the agreement with your counterpart and move on, lest you spoil the deal. By contrast, ask the other party whether they would be willing to take another look at the agreement to see if it can be made better. Explain to your counterpart that you would each be free to reject a revised deal if it doesn't improve both of your outcomes. This type of post-settlement settlement can lead to new sources of value to divide between you. It can also help generate a win-win outcome if you didn't have one before. Your success in hammering out your initial agreement may have established the trust needed to explore the possibility of an even stronger deal.

Excerpt from [pon.harvard.edu](http://pon.harvard.edu)

## Influential communications



**Student note:** Influential communication is covered in more detail in the People Leadership cluster, however, the content below is additional and very useful in the context of managing meetings.

### *Personal Impact*

Personal impact exists on three levels, namely: the way we wish to be perceived, the way we think we are perceived, and more importantly, the way we are actually perceived by others. Our perception of others, and therefore, their perception of us, is built on three separate aspects of self. In interpersonal interactions, personal impact can be viewed in terms of the visual (how we look), vocal (how we sound) and content (what we say):



**Visual** – in any face-to-face situation what we see will always be the most influential factor in how we build our impression of someone else. In fact, it accounts for around 60% of our overall perception. Visual factors that help us to build our perception of others include physical appearance, clothing, grooming, styling, posture, demeanour and facial expressions.



**Vocal** – the way we sound is far more important than what we say accounting for around 30% of the overall picture that others develop of us. Elements of the voice include pitch, pace, volume, articulation and energy.



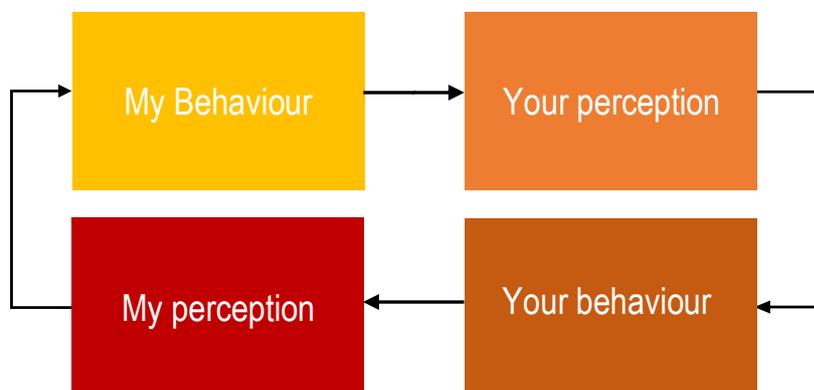
**Content** – the final and least influential factor is based on language – the words and phrases we use to express what we think and feel.

According to Forbes (2018) it takes just seven seconds to make an impression. We build our perceptions of people within this short time. We perceive emotions, attributes and attitudes. Whenever you speak, the sound of your voice generates feelings and gut level reactions in other people. Some of these responses are conscious, others are not, however they form the basis of people's perception of you.

### **Impact: Behaviour Cycle**

Personal impact isn't confined to first meetings and first impressions. In fact, we are constantly having an impact on others, and likewise them on us. All three aspects of our impact (the visual, vocal and content) cause reactions in others that in turn dictate their behaviour towards us. This is referred to as the impact: behaviour cycle which describes how:

- the way that you behave affects...
- the impact you have on a person, which affects...
- the way they feel about you and themselves, which affects...
- the way that they respond, which affects...
- the impact they have on you, which affects...
- the way you feel about them and yourself, which affects...
- the way that you behave.



Simply put, the cycle explains why it is that when someone is angry with you, you can easily become angry with them, or why laughter is infectious, and a smile begets a smile. Observe interactions between people in both working and social environments and notice the changes in communication and behaviour that occur throughout.

### Passive to Aggressive



No person is assertive, aggressive or passive all of the time. Everyone behaves in each way at various times and to varying degrees, depending on the situation. However, most people have a tendency towards one of the styles, particularly when under stress.

#### Passive

Non-assertive behaviour usually comes from a feeling of low self-esteem and may include beliefs such as 'my ideas or feelings aren't important' or 'it doesn't matter what I say'. Non-assertive behaviour is usually a reaction to the fear that what we say will be misinterpreted or will lead to people not liking us.

#### Aggressive

Aggressive behaviour mainly involves manipulating or denying others in the course of expressing oneself. Aggressive behaviour is frequently self-enhancing and when acting aggressively a person will often be expressive of their feelings in the situation. Aggressive behaviour often hurts other people in the process by making choices for them and by minimising their worth.

#### Passive-aggressive

Aggressive behaviour also takes the form of passive, non-oppositional action. Sometimes such actions are sneaky or sly. This is the smiling, friendly, agreeable behaviour that hides backstabbing or undermining action.

Some passive-aggressive tactics include:

- Hostile attitude
- Procrastination
- Intentional poor performance
- Silent treatment
- Back-handed compliments
- Getting the last punch.

#### Assertive

An assertive style communicates an impression of self-respect and respect for others. It views our wants, needs and rights as equal with those of others. Behaviour is person- and situation-specific, (not universal) and focuses on honest expression of thoughts and feelings.

Simply put, assertiveness could be described as, ‘Doing what’s right by you, while doing what’s right by others.’

**Activity: Barrier to assertiveness**

Rate yourself against the following statements:

	<b>Always</b>	<b>Often</b>	<b>Never</b>
I am able to express positive feelings			
I am able to express negative feelings			
I am able to refuse requests and invitations			
I am able to express my opinions			
I am able to express justified anger			
I am able to ask for the things I want and need			
I am able to be myself			
I am able to take responsibility for my actions			
I am able to be wrong and to learn			
I am able to be true to myself and my instincts			

**Never responses** – indicate barriers to assertiveness that you can focus attention on removing.

**Often responses** – could indicate potential barriers. Explore this further; are there certain people, situations or events where your response would be Never or Always? What makes the difference and how can you learn to be more consistent?

**Always responses** – these are not barriers for you. Are they perhaps strengths that you could draw on to become more assertive in other areas?

## Questioning for influence

To persuade or influence others, consider the use of questions such as:

**Probing questions** – these are asked to prompt someone to ask themselves ‘why’ they answered in a specific way. For example, “You mentioned electric cars are not as green as combustion engine vehicles – could you explain how you came to this?”

**Leading questions** – a leading question is one in which you know the person’s likely answer, but you ask to develop your point further. For example, “If the carbon footprint of an electric car running for 12 months is X, and a fossil fuelled car is Y, would this be more or less efficient on a community scale?”

**Rhetorical questions** – these are questions where the answer doesn’t need to be said out loud, rather it is inferred in the way the question was asked. For example, “Given the overwhelming scientific evidence, is electric a better way for the auto industry to head?”

You can further influence the answers by using body language to support the answer you would like to hear – for example nod instead of a shake of your head, or a smile instead of a frown.

### Discussion

When have you used questions to ‘get your way’ rather than telling someone what you want?

## Problem-solving tools

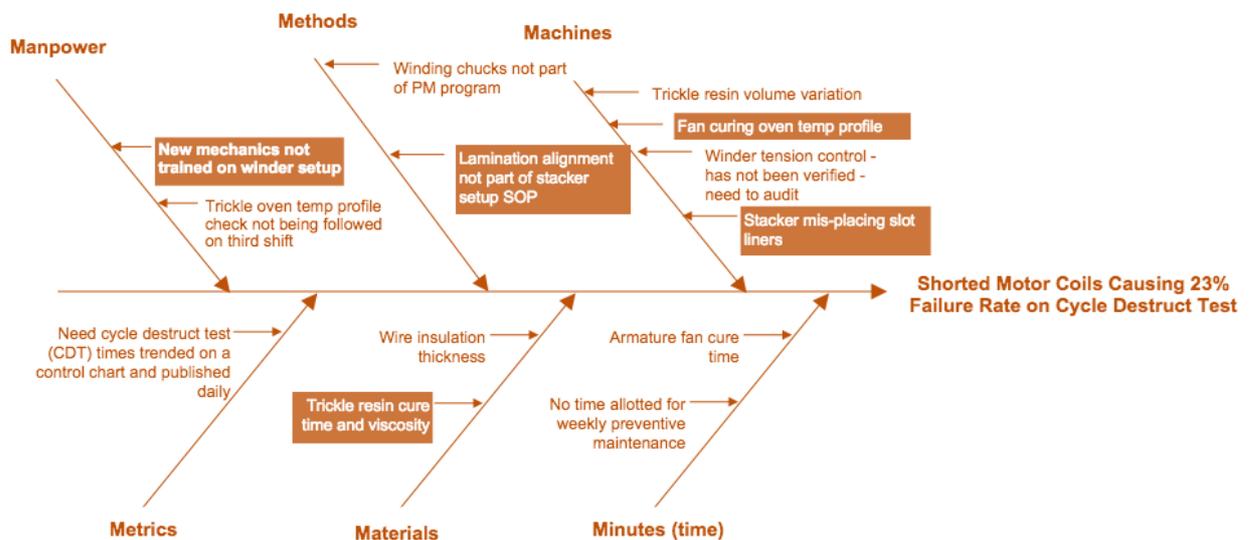
When trying to solve problems during a meeting, it is important to be prepared with an effective method for approaching them. There are numerous tools available to assist you during a meeting. Common examples are explained below:

### *Fishbone (Cause and Effect) Diagram*

A fishbone (or cause and effect diagram) is a tool that enables you to identify all the causes that contribute to a particular effect. It can be used in two ways:

- to identify elements and sub-elements which combine to cause a problem ,or
- to look at the various factors or conditions which need to be present in order to produce a desired outcome.

### Fishbone Diagram: Shorted Motor Coils



### *Inductive reasoning*

This technique involves making useful generalisations about the environment as a whole, based upon a necessarily limited number of observations.

The scientific method, which has done so much to advance humanity in the last 500 years, is inductive reasoning in its purest form. Used appropriately, it can be incredibly powerful. But, if you use faulty or unrepresentative data, your conclusions can be flawed.

At the core of inductive reasoning is the ability to look at outcomes, events, ideas and observations, and draw these together to reach a unified conclusion. Considering this, an experienced business person can use his or her own experiences to draw conclusions about current situations and solve problems based on what he or she has known to work in the past in similar situations.

By accepting conclusions derived from inductive reasoning as "true" (in a practical sense), good managers can build on these conclusions and move forward effectively and successfully.

### *Six Thinking Hats*

Six Thinking Hats is a tool devised by Edward de Bono for evaluating ideas. It comes under the umbrella of constructive controversy techniques. Each of the six hats represents a particular perspective or thinking style from which the idea must be considered.



- Blue Hat: Looks not at the subject of the thinking but at the thinking itself and is used for building, managing, and concluding the process, including using and sequencing use of the other hats.
- White Hat: This hat focuses on the available information. One look at the information and assess the preceding trends.
- Red Hat: Red hat allows one to perceive the problems utilizing one's intuition, emotion and gut feeling.
- Green Hat: This hat symbolizes creativities and innovation. This thinking allows one to cultivate creative solutions of a difficult scenario. It is an independent way of thinking, where one discovers a little amount of criticism of the perception as well.
- Yellow Hat: This hat allows one to have an optimistic viewpoint, which means to look out for all the advantages of the decision and the worth of it.
- Black Hat: This hat perceives all probably negative outcomes of a decision. One has to perceive these carefully and defensively.

### Evaluating ideas

Think of an idea you'd like to implement in your workplace. Using the 6 perspectives of the 'thinking hats' – evaluate the idea and write a summary below

White	
Red	
Green	
Yellow	
Black	

### Recording the outcomes

For a meeting to be valuable, a list of outcomes must be recorded by the end of the allocated time. Even if there is no resolution on some discussion points, a clear way forward must be recorded.

Taking minutes at meetings is a valuable skill. Generally speaking, someone who is not involved in the discussion should be appointed to take notes, however this is not always possible. In this instance, consider the use of a recording device (this is easy in virtual meetings) or appoint someone who is capable of taking down key points and outcomes.

## After the meeting

There are three important steps to completing an effective meeting. These are:

1. Review the notes or minutes and draft a follow up communication (usually email)
2. Distribute the notes along with any designated timelines to the key stakeholders – those tasked with fulfilling the follow-up actions, as well as any others who attended the meeting
3. Record the actions and communicate these with the stakeholders who were not at the meeting – such as a CEO, manager, staff, thrid party and so on.

When drafting the communication be clear, concise and accurate. Avoid spelling mistakes and any compulsion to further explain the reasons behind decisions made at the meeting. i.e. “These are the outcomes, and this is who is responsible for the next steps”.

### Technology note:

There are numerous apps and desktop programs designed to streamline the process of meetings. These often include synchronous and asynchronous record sharing options, scheduling tools, follow up tasks management and more. Investigate the current systems within your organisations before using a third party or new application as this might not be suitable within your organisational context (e.g. security concerns, compatibility concerns or training requirements). Some examples are listed below:

Product	Deployment	Board Meetings	Committee Meetings	Internal Meetings	Legislative Meetings
 <b>PlayBooks</b>	☁	✓	✓	✓	✓
 <b>Miro</b> ★★★★★ (247 reviews)	🖥️ 📱 ☁	✓	✓	✓	✓
 <b>Pexip</b> ★★★★★ (60 reviews)	🖥️ 📱 ☁	✓	✓	✓	✓
 <b>Teem</b> ★★★★★ (35 reviews)	☁	✓	✓	✓	✓
 <b>OnBoard</b> ★★★★★ (692 reviews)	🖥️ 📱 ☁	✓	✓	✓	✓
 <b>Asana</b> ★★★★★ (9316 reviews)	🖥️ 📱 ☁	✓	✓	✓	✓
 <b>BoardEffect</b> ★★★★★ (51 reviews)	📱 ☁	✓	✓	✓	✓
 <b>Boardable</b> ★★★★★ (58 reviews)	📱 ☁	✓	✓	✓	✓
 <b>Livestorm</b> ★★★★★ (253 reviews)	☁	✓	✓	✓	✓
 <b>Robin Powered</b> ★★★★★ (45 reviews)	📱 ☁	✓	✓	✓	✓



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