Why successful project execution needs a plan

Your Proposal is not your Plan

Patricia (Patty) Huntley, PMP, MBA
Risk Manager Loss Prevention & Client Education
Workshop Learning Objectives

1. At the conclusion of this program attendees will be able to prepare a project management plan that restates and supports the architect’s role in the delivery of structural, mechanical, electrical and plumbing building systems and confirms the required integrity of these systems.

2. This program provides attendees with a tool to prepare for a design that protects the safety and welfare of the users by identifying building codes, zoning laws and regulations that apply to the project and integrating these legal considerations into drawing and specifications.

3. After completing this program attendees will have a tool to define the soundness and health impacts of the design by confirming the completion of appropriate land-use analysis, health impact assessments, programming and surveying.

4. Today's program participants will use the Project Management Plan to analyze risks associated with construction systems, products and finishes, and to subsequently assess and plan the use of materials and construction methods to protect the life and safety of the public.
Your Proposal is not your Plan Agenda

1. Risk Drivers & planning
2. Proposals vs. Project Management Plans
3. Project Management Plan as a Roadmap
4. Effective use of a Project Management Plan
YOUR INSTRUCTOR
Patricia (Patty) Huntley, PMP, MBA

+1 year, Risk Manager, XL Catlin, Design Profession Loss Prevention Education – June 2016

15 years, A/E/C Project Delivery Consultant, PSMJ Resources, Inc. and Construction Management Consultant & Trainer (2002-2016)

13 years, Senior Project Manager of design/build environmental engineering projects, The RETEC Group, Inc. (1989-2002)

- 7 years in mining industry
- Certified Project Management Professional (PMI)
- B.S., M.S.(abt) Colorado State University; M.B.A. University of Denver
Your Proposal is not your Plan

1. My client was surprised that our project fee does not cover unknown conditions on the project.

2. I gave everyone working on the project a copy of the proposal but they spent time on rework because of misunderstandings about what they are supposed to do.

3. My client was really unhappy with me when I talked with them about the cost of the additional work they requested. They said it should have been included in the original cost estimate.
Section 1

Risk Drivers & Planning
XL Catlin’s Design Professional Insurance

Risk Drivers

2 classifications of causes leading to a loss prevention file or a claim being made

1) TECHNICAL
2) NON-TECHNICAL
XL Catlin’s Design Professional Insurance

Proprietary Research

7/10 claims have non-technical factors that contribute to technical errors
Technical vs. non-technical

NON-TECHNICAL ➔ TECHNICAL

Breakdown in project or practice management processes ➔ Error and/or omission of a technical nature

CONTRIBUTES TO ➔ RESULTS IN

Loss Prevention File or Claim
Risk Driver Interrelationship

contributes to, or exacerbates a claim
Risk Drivers 2.0 by claims count

- Communications: 30%
- Construction Phase Services: 18%
- Client Selection: 16%
- Project Team Capabilities: 14%
- Negotiations & Contracts: 6%

QUALITY MANAGEMENT: 12%
Risk Drivers (No. 1 by claims count)

Communications

- Lack of procedures to identify conflicts, errors and omissions: 55%
- Project issues/disputes not handled well: 13%
- Scope of services not clearly explained to client: 13%
- Multiple/Other issues: 19%

30% of non-technical Risk Drivers
1. Start projects correctly  
   • Plan then do  
2. Don’t hope it will get better - manage communication  
3. Do engage XL Catlin early
Section 2

Proposal vs. Project Management Plan
What are you offering?

<table>
<thead>
<tr>
<th>Task Delivery</th>
<th>Product Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detailed Scope, Schedule, Budget</td>
<td>Define project goals, approach, detailed scope of work</td>
</tr>
<tr>
<td>Complete all tasks within the budget &amp; schedule</td>
<td>Deliver outcomes - project goals, client needs, client objectives, company needs</td>
</tr>
</tbody>
</table>

Completed project

Completed tasks | Met client expectations
Proposal vs. PMP
Where would you find the following?

- Project Objectives
- Scope of Work
- Schedule
- Budget
- Team Organization
- Risk Management Plan
- Quality Control Plan
- Communication Plan
- Project Closeout Checklist
The devil is in the details

Your Proposal

- Present project goals
- Introduce project team
- Present “amazing” project

Project Execution

- Define Measures – monitor and forecast outcomes
- Define Metrics – quantify an outcome
- Manage project team
- Execute “real” project
- Communicate & manage change
- Monitor & manage risks
- Manage & meet client expectations
The devil is in the details (continued)

### Your Proposal

- Present “winning” project schedule & fee
- Present Quality Process
- Discuss Communication

### Project Execution

- Monitor - Budget & Schedule
- Communicate Status – Budget & Schedule
- Communicate & Manage Change
- Execute Quality Management
- Define Communication Plan
- Execute team and client communication
Firms with formal project management planning
Survey of 229 Firms (PSMJ Resources, Inc.)

- 21% Almost Always Prepare or generally prepare written plan
- 31% Usually to Often Prepare or generally prepare written plan
- 30% Occasionally Generally do not or rarely prepare a written plan
- 18% Rarely Generally do not or rarely prepare a written plan

Survey source: PSMJ Resources, Inc.
Project planning improves budget performance & client satisfaction (PSMJ Resources, Inc.)

Survey source: PSMJ Resources, Inc.
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<th>Excuse Crusher</th>
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<td>I have a tight budget</td>
<td>Generally 1 - 3% of budget</td>
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<td>My client will not pay for this</td>
<td>Include it in your budget</td>
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<tr>
<td>I manage too many projects to do this for each one</td>
<td>Let’s do the math</td>
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<tr>
<td>I am a project manager/doer</td>
<td>I like looking busy &amp; rushed, instead of effective &amp; efficient</td>
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<tr>
<td>I keep my client happy by getting the work done</td>
<td>Are you completing tasks or delivering a product?</td>
</tr>
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</table>
Section 3

PMP as Roadmap
What documents do you need to review while preparing your PMP?

List three documents

1. ________________________________
2. ________________________________
3. ________________________________
Bringing it all together

1. RFP – Request for proposal
2. Go-No-Go evaluation
3. Proposal - including
   - Detailed WBS (Scope)
   - Detailed schedule & fee
4. Negotiation notes - changes & additions
5. Contract
When do you complete a Project Management Plan?

**AFTER**

you have signed the Contract

**BUT . . .**

**BEFORE**

you start billing project work
Right-sized PMPs

1. Small PMP

2. PMP

- Fee size
- Team size
- Project complexity
- Duration
PMP for projects with fees less than $25,000

**Small PMP**

- Project fee < $25,000
- Single
  - discipline
  - sub-contractor/consultant
  - client contact
- Routine projects
- 1 - 3 people work on project
- Short duration < 12 weeks
Small Project Management Plan <$25,000 fee

<table>
<thead>
<tr>
<th>Small PMP Components</th>
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<tr>
<td>1. Project Information</td>
</tr>
<tr>
<td>2. Client Information</td>
</tr>
<tr>
<td>3. Scope-of-Work</td>
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<td>4. Budget</td>
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<td>5. Due Dates</td>
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<td>Task / Element</td>
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**PMP for small project**

**TOTALS**
## Small PMP – General Project Information

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<tr>
<td>Address:</td>
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## Small PMP – Scope, Schedule, Budget

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**DO YOU NEED BOTH?**

**TOTALS**
PMP for projects fees > (greater than) $25,000

- Project fee >$25,000
- Multiple
  - disciplines
  - sub-contractors/consultants
  - diverse group of stakeholders
- Complex project
- Multiple people/offices work on project
- Longer duration >12 weeks
## PMP Components

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<td>5. Team</td>
<td>10. Change Management</td>
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Align vision, goals, objectives

- Process
- Product
- Project

Team Performance
Quality of Design
Project Objectives

Define with Measures & Metrics
Align process

Process

Team Performance

- Communication
- Responsiveness
- Resource availability
- Effectiveness of meetings
- Resolution of issues
Align product

Product

Quality of Design

- Functionality
- Ease-of-use
- LEED Certification
- Regulatory Compliance
- Cost-effective design
Align project

Project Objectives

- Well-developed SOW
- Meet deliverable deadlines
- Meet project budget
- Manage change
- Timely procurement
## Scope-of-Work & Schedule

**Project Name:**

**Client:**

**Project Number:**

**Project Manager:**

**Date Prepared:**

**PIC:**

**Project Start Date:** Jan 15

**Project Finish Date:** June 15

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# Project Budget

**Project Name:**

**Client:**

**Project Number:**

**Project Manager:**

**Date Prepared:**

**PIC:**

**Project Start Date:** Jan 15

**Project Finish Date:** June 15

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## Schedule

### Schedule - Bar Chart

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**Project Name:**

**Client:**

**Project Number:**

**Project Manager:**

**Date Prepared:**

**Start Date:** Jan 15,  
**Finish Date:** June 15,
## Team

### Project Team

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- Internal project team
- Sub-consultant teams
- Sub-contractor teams
- Client
- Client Representative
- Significant Stakeholders

**Emergency Contact Information**
Document Distribution

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- All deliverables
- Internal draft dates
- Internal review dates
- Final deliverables
- Confirm recipient delivery method/format
- Client review dates as a deliverable

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**Project Communication**

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<thead>
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<th>Type</th>
<th>Date/Frequency</th>
<th>Attendees</th>
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</thead>
<tbody>
<tr>
<td>Weekly meetings</td>
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<td>Monthly meetings</td>
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<td>Progress reports</td>
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<td>Conference calls</td>
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<td>Invoice summaries</td>
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<td>Design meetings</td>
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</table>
Risk Management

More than Probability x Severity

1. Value-added discussion
2. Proactive vs. reactive
3. IDs potential changes to the project
4. Daylights client concerns
Common Categories of Project Risks

- Contracts & Negotiations
- Scope Management
- Financial Management
- Schedule Management
- Resource Availability

- Technical Integrity
- Quality Assurance
- Project Type
- Client Management
- Health & Safety, Regulatory
## Risk Management Log

### Risk Management

<table>
<thead>
<tr>
<th>Risk No.</th>
<th>Potential Risk</th>
<th>Risk Owner</th>
<th>Trigger</th>
<th>Dependencies</th>
<th>Probability (Hi/Med/Low)</th>
<th>Impact (Hi/Med/Low)</th>
<th>Management Strategy</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>R1</td>
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<td></td>
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<td>R2</td>
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</tbody>
</table>

- Potential risk – identify potential problems that could impact project
- Risk owner – responsible for managing risk
- Trigger – early warning sign that an event may occur
- Dependencies – contributing factors that drive a risk event
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<td>R1</td>
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</tbody>
</table>

- Probability – the likelihood a risk will occur
- Severity – the degree of harm if an event occurs
- Management Strategy – avoid, mitigate, accept & monitor, transfer
- Status – update throughout project until potential risk is gone
Quality

QUALITY MANAGEMENT

Quality Assurance Process

- Defines expectations
- Plans project execution
- Supports active team collaboration
- Adherence to budget & schedule
- Defines checklists, techniques, methods to assure quality

Quality Control Plan

- Design/Technical review
- Followed standards
- Drawings-to-Specs review
- Senior management review
- Constructability review
- CHECKING
## Quality Control Plan

**QC Plan**

<table>
<thead>
<tr>
<th>Document for Review</th>
<th>Document due from</th>
<th>To Reviewer</th>
<th>Date due to reviewer</th>
<th>Date for review completion</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

### Standards, Procedures, SOPs, Project Documents

<table>
<thead>
<tr>
<th>Title</th>
<th>Comments</th>
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<tbody>
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Change Management

Managing Change

1. Discuss change process – Kick-off
2. Recognize & identify change
3. Leverage
4. Define impact of change
5. Obtain approval for change
6. Document change
## Add Services (Change Order) Form

<table>
<thead>
<tr>
<th>Select one:</th>
<th>Date:</th>
<th>Project Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Scope</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase in Scope</td>
<td></td>
<td>Project Manager:</td>
</tr>
<tr>
<td>Decrease in Scope</td>
<td>Task Number:</td>
<td>Client Rep.:</td>
</tr>
</tbody>
</table>

### Current Scope of Work

(Describe the requirements/specifications)

### Reason for Change

(Describe in detail the reason for the change)

### Proposed Scope of Work Change

(Describe in detail the reason for the change)

### Cost Estimate (attach backup)

### Schedule Impact (attach backup)

Project Manager: ____________  
Authorized Client Representative: ____________  
Signature: ____________  
Signature: ____________
Section 4

Effective use of your PMP
PMP is consulted continuously

When?

1) Working through a scope change
2) Completing a phase of work
3) Reviewing draft invoice
4) Prior to submitting a deliverable
PMP is an evergreen document

Update as change occurs

1) Change Order or Add Service
2) Scope Creep
3) Change on team
4) Change on client team
5) Change in Stakeholder requirements
6) Unexpected delays or problems
Wrap up
Your Proposal is not your Plan

What did we cover?

1) Risk Drivers
2) Proposal vs. Plan
3) PMP as Road Map
   • Small PMP
   • PMP
4) Effective use of PMP
Questions?
THANK YOU

MAKE YOUR WORLD GO