



Post training and benefits realisation workshop report for X Company

Prepared for X Company
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Pre-Training

Rationale for training

X Company have a newly created project process that has not yet been implemented in the business. The Project Management Manual (PPM) is a work in progress and it is anticipated that the training will add value to the development of a scalable methodology which will be tailored to meet the functionality required when managing projects efficiently at X Company.

The existing X Company project management related documents provided to WGM in order to develop a cross reference with the WGM Managing Projects course materials were:

- Blah .pdf format
- Project Management Manual (PPM).pdf format

Of the two documents provided, X COMPANY agreed that the most pertinent document to the current practice of project management at X COMPANY is the Blah document.

The recommended approach is to provide a blank template of the gap analysis matrix to be filled out by the delegates during the training as they would be identifying a gap analysis between how they currently practice PM and what they are learning. They would be encouraged to complete the matrix as they progressed through the training.

The advantage of this approach is we will be gathering information from the delegates as to how we can create/implement a useful methodology with appropriate tools moving forward rather than telling them what they have to do.

Training Delivery

The Approach

Utilise a sound Fundamentals of Project Management training course and deliver it in its standard form (no tailoring) to a key group of experienced staff at X COMPANY.

Objectives

The key objectives, as identified by X Company for the Project Management training session was as follows:

- the 3 day Managing Projects material will be delivered in its original form,
- there will be no in depth tailoring at this point,
- the WGM case study and exercises will remain as per the standard delivery of the training course, for future deliveries and if X Company have a preference to utilise one of their own projects as a case study, a specific project and the details thereof would need to be provided prior to the delivery of a specific course,
- post training, to develop a scalable efficient methodology for X Company,

- utilising all the information developed by the delegates, it will be possible to analyse the information and devise a single pragmatic approach to managing projects at X Company.

Outcomes

The desired outcomes of the first training session were:

- to provide the X COMPANY staff with the most practical and pragmatic skills and tools to do their jobs in the most efficient manner possible,
- identifying a gap analysis between how the X COMPANY staff currently practice PM and what they are learned,
- develop an individual action plan to take away and implement lessons learned into the workplace.

See attachment 1 for the documented outcomes from the training course.

Post Training

The Approach

Facilitate a 1 day reinforcement workshop and invite the delegates who attended the training course.

Objectives and Outcomes

The agenda of the workshop was as follows:

- To identify and document any actions they had managed to successfully implement since the training course,
- Discuss and document any improvements that had been made in the workplace due to these implemented actions, as well as attempt to identify any potential improvements into the future due to the training,
- Discuss and document any hurdles or bottlenecks they encountered in the workplace which prevented them from implementing their actions,
- Identify and document any potential methods and ideas which may allow them to overcome these hurdles or bottlenecks and
- Finally a new action plan for the group would be discussed and documented to be taken away from the workshop.

See attachment 2 for the documented outcomes from the workshop session.

Moving Forward

Training Course 2

Conduct a second training course as per the first training course, however to a wider spectrum of X COMPANY selected delegates.

Reinforcement Workshop 2

Conduct a second workshop as per the first workshop utilising the same agenda and aiming for similar outcomes as the first workshop.

Reinforcement Workshop 3

Utilising the findings from both the previous training sessions as well as the outcomes from the previous 2 workshops, it is anticipated a final workshop be facilitated in order to:

- connect the group with a common purpose,
- build a consistent best practice working group,
- To identify and document any actions they had managed to successfully implement since the training course,
- Discuss and document any improvements that had been made in the workplace due to these implemented actions, as well as attempt to identify any potential improvements into the future due to the training.

Timeline

As a result of discussions with the client, it was agreed the best time to schedule the second 3 day training course would be in Sept 2010, with the 1 day reinforcement workshop being conducted approximately 2 weeks afterwards.

The time to collate all the data and finalise the post training report for the second training course is estimated at two days.

This report will be due 3 weeks after the information has been entered into a word document by the client and emailed to the facilitator.

The final 1 day workshop should occur approximately 1 to 3 months after the second reinforcement session.

If the client would like a final report for the whole training effort, lessons learned, action items and suggested way forward after the final workshop, the time to collate all the data and complete the final post training report is estimated at two days.

Recommendation

The documented outcomes from the 2 training courses and the 3 workshops should be taken into account by the newly formed PMO and each action should be systematically worked on to achieve a consistent approach to project management within the department. Some of the hurdles and proposed solutions identified are bigger than the PMO and require senior management support and assistance to enact.

Attachment 1- Training Session 1 Outcomes

The takeaways, as identified and documented by all delegates attending the training, were twofold, these were:

- Identify the highest priority action items as agreed by the delegates,
- Identify the obvious gaps in their current processes as opposed to the best practice process taught during the training course.

High Priority Action Items

The high priority action items, categorised with the criteria of “low effort, maximum gain” as identified by the delegates which they said they would attempt to take away and implement in the short term were:

- Assign ownership to WP (commitment)
- Network diagram – ID the Critical Path
- Understand PLC and mapping projects into it
- More structure to Risk Management (consistently)
- Stakeholder register and engagement
- WBS
- Refine work schedule and resource plan
- Selling the risk to get resources
- Triple constraints – negotiation/communication
- Lessons learned database
- Recognition

Process Gaps

The process gaps, identified by the delegates who expressed they would like to see addressed by their organisation moving forward were:

Initiation Stage:

- Involvement of stakeholders (key)
- Verify a definitive sponsor
- Ensure business case
 - With feasibility – focus on environmental factors and other potential risks.
 - Benefits
- Initiate communications plan
- Appoint an owner and author of PI & PP phases
- Align dept heads’ KPIs to a single project / progress focus
- Project Charter document
- No consistency
- Flesh out functional requirements
- Organisation governance – minimise micro management

Planning Stage:

- Budgeting vs forecasting process (bucket approach)
- Communications plan
- No PMP

- Need an avenue to the PMO for assistance
- Roles and Responsibilities Matrix (buy in and ownership)
- Risk Register
- Work Breakdown Structure – estimating – critical path analysis
- Procurement requirements
- PM process that is scalable (magnitude, time, complexity)
- Negotiation and analysis of 3 constraints with client
- Change control process (standard)
- Program view of sub projects (resource mgt and levelling)
- Sign off and acceptance of ownership of Work Packages
- Consistent tools (scheduling and process)

Implementation / Executing Stage:

- Issuing of Work Packages (resource commitment)
- Resource issues (quality vs quantity)
- Standardised reporting (tools)
- Standardised performance monitoring (tools)
- Ownership of project work + mgt during implementation
- Status evaluation (metric for % complete)
- Accounting data (time, lag).

Close Out Stage:

- Post project reviews (audit)
- Lessons learned database
- Rewards & recognition

Attachment 2 – Reinforcement Workshop Outcomes

Agenda for the day

The day was broken into a number of activities to gain various input from the delegates, these were highlighted in an agenda communicated to all participants. The agenda was as follows:

- To identify and document any actions they had managed to successfully implement since the training course,
- Discuss and document any improvements that had been made in the workplace due to these implemented actions, as well as attempt to identify any potential improvements into the future due to the training,
- Discuss and document any hurdles or bottlenecks they encountered in the workplace which prevented them from implementing their actions,
- Identify and document any potential methods and ideas which may allow them to overcome these hurdles or bottlenecks and
- Finally a new action plan for the group would be discussed and documented to be taken away from the workshop.

Successfully Implemented Actions

As there was only a 2 week timeframe in-between the training course and the reinforcement session, there was a surprising amount of success in the implementation of lessons learned from the training course. However each individual had a different success rate and there were various levels of success. In order to capture the information, the delegates were once again grouped as they were during the training course to discuss and capture the gains thus far. The implemented actions are as follows:

1. Starting a communications plan,
2. etc.

The table below refers back to the list of actions above (each given a specific identification number) to list the perceived changes and gains made due to the implementation of these actions.

Improvements in the Workplace

Action	Short Term Gain	Potential L/Term Gain
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Hurdles and Bottlenecks to Implementing Actions

As with any change to the operating environment, no matter how complex or simple it may be, there will always be hurdles and / or bottlenecks which impede the successful implementation of these changes.

Refer to the table below which highlights some of the hurdles faced (or perceived to be faced in the future) when attempting to implement this lesson learned.

Action	Hurdle
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Potential Solutions to Overcome Hurdles

The groups were asked to offer any suggestions they felt would assist in minimising the hurdles and / or bottlenecks which may impede the successful implementation of these changes.

The table below refers back to the previous hurdles table (each given a specific identification letter) and provides some input from the groups as to some potential strategies that may be deployed to minimise some of the hurdles faced (or perceived to be faced in the future) when attempting to implement this lesson learned.

Hurdle	Potential Solution	Responsibility
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Final Action Plan

At the conclusion of the day, it was agreed that each delegate would work on their individual action plans in the short term. It was agreed there was no need to re-document a new action plan.