

Project Co-ordination

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LEARNING OUTCOMES

Learning Outcome 1

Employ appropriate strategies in order to establish objectives for the meeting with the customer.

Assessment Criteria

- 1.1 Use appropriate interpersonal skills required to set objectives with the customer, including:
 - choosing the decision-maker;
 - encouraging ownership of the decision;
 - assertiveness;
 - teamwork;
 - encouraging accountability;
 - providing a supportive environment;
 - encouraging participation.
- 1.2 Establish objectives to ensure the success of a meeting, taking into account the following factors:
 - budget restrictions;
 - equipment requirements;
 - priorities;
 - meeting outcomes;
 - size of meeting;
 - location and access of site.

Content

1.1 Interpersonal skills for setting objectives with the customer

- choosing the decision-maker

- your role and capability
 - are you employed by the customer organisation?
 - is meeting planning part of your functional responsibility?
 - is a project team approach likely?
 - are you a meetings consultant?
 - what is your preferred role, project leadership or facilitation?
 - do you have credibility for your preferred role?
 - have you researched your prospect?
 - have you defined a plan of approach for initial contact?
- initial client meeting to explore and clarify
 - authority of contact
 - meeting feasibility proposal status
 - previous meeting history, outcomes and organisation approach
 - type of organisation
 - type of meeting proposed
 - draft meeting objectives and relevance to corporate mission, objectives, strategies and priorities
 - corporate organisation structure
 - target audience
 - anticipated key meeting decisions
 - anticipated meeting decision-making process
- encouraging ownership of the decision
 - this depends on the decision and is related to securing commitment
 - the basic idea is that a project or task is delegated and that person sees themselves as being responsible
 - ownership suggests that the person assumes responsibility as if it was their own money at stake and as if they were doing it for themselves, like a small business-person or entrepreneur. They become responsible for anticipation, foresight, and initiative as well as for the defined responsibility. If anything goes wrong within or outside their control they must be the first to act in the problem-solving process and maintain a high level of motivation (consistent with ownership) until the matter is resolved and successfully implemented
- assertiveness
 - this is an inter-personal skill and relates to confronting issues in a pro-active way rather than passively accepting sub-optimal situations
 - the key skill is confronting the issue and not the person. Personal attack leads to communication on an unproductive subjective level. Rather than degenerating into blaming and emotion the effective manager deals with the issues and maintains a strong “task” focus on the planning and problem-solving process

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- most projects will produce crisis situations and a high level of assertiveness will be required, particularly with sub-contractors and suppliers whose work falls below promised or normal standards. In these situations assertiveness will need to be also based on punitive action after appropriate warnings
 - teamwork
 - the best teams have a good mix of generalists and specialists. The specialists take responsibility for key functional areas. The generalists are specialists and leaders who have sound generic skills in task and people management and who are able to understand the key specialist areas. Eg a conference project manager might be expected to be experienced in organising a conference but would also be advantaged by a sound grasp of marketing and finance. This would enable them to maintain a strong “general management” hold over the project.
 - each team member must have effective task and people skills
 - task skills include planning, organising, delegation, monitoring, marketing, finance and project management as well as technical skills
 - people skills include communication, motivation, leadership and co-operation during task activity
 - team-building for higher productivity and morale requires
 - an open environment supportive of creativity and innovation
 - time and opportunity to build relationships, particularly in the “identification” stages when strangers need to identify themselves with each other and commence relationship activities
 - commitment to a plan, preferably developed using participation
 - defined roles and expectations
 - performance monitoring and feedback
 - recognition for good work and group pressure on poor work
 - this topic would have been extensively dealt with in other learning modules
 - encouraging accountability
 - see “ownership” above
 - this suggest accounting responsibility in the sense that effort will be brought to account, financially measured and people held responsible for financial performance
 - the prime areas for accountability are time, cost and quality

- accountability must relate to the budgeted and actual financial statements with appropriate cognisance of cost centre and activity cost measurement and reporting
- providing a supportive environment
 - see teamwork above
 - people feel supported when their needs are being met, particularly for security, belonging, recognition and achievement. The best way to satisfy these needs is to have a successfully running project. Task achievement provides a healthy stimulus to people satisfaction.
 - key areas for support are
 - to give (and maintain) authority commensurate with responsibility
 - to ensure adequate physical, human and financial resources are available
 - to provide quick and reliable feed-back where information is required
 - to provide effective support to the problem-solving process when required
- encouraging participation
 - participative approaches are generally the most effective, particularly in relatively “normal” situations
 - in an extreme crisis however a more autocratic style can be beneficial until circumstances normalise
 - participation is not to be confused with committee-work. People must still have responsibility allocations. No free rides. Representation for “political” reasons needs to be managed with care.
 - this topic would have been extensively dealt with in other learning modules
- Class Exercise 2 (say ½ hour)
 - distribute Handout 1.2B “UBD Conference Check-list”
 - discuss the above topics in relationship to selected activities on this list
 - participation in the project formation stage (concept/theme, product definition, speakers etc)
 - team-work in the week preceding the main event
 - providing a supportive environment for the PCO

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- encouraging ownership and accountability by a marketing sub-committee
 - for a PCO being assertive with a non-performing venue
 - for a project manager being assertive with a speaker running very late with a speech outline

1.2 Task skills for setting objectives

- project management
 - a project, compared to the life of an organisation
 - has a defined life with a specific “sunset”. It has a beginning and an end.
 - starts from the original concept to final execution (eg in the case of a new building, to handover for occupation)
 - often needs resources on a part-time basis and therefore requires more intensive human resource management
 - requires a multi-disciplinary team with a high degree of “generalist” skills as well as “specialist” skills (technical and functional skills) to meet the need for effective decision-making and flexible response. A high (higher) standard of inter-personal skill is also essential.
 - a project should always have clearly defined cost, time and quality objectives
 - what is a project manager responsible for.....time (through a schedule), cost (through a budget) and quality (through appropriate specifications)
 - projects usually involve the design and implementation of physical assets, events and one-off major initiatives including
 - design and construction of new buildings
 - new product development
 - major events
 - major consulting programmes
 - major organisational studies eg corporate planning, re-structuring, re-location, new equipment and facilities etc
 - major promotional programmes
 - major urban planning projects

- major political and military campaigns
- developed as an organised concept during the space programme in the USA in the 1960's and quickly spread throughout the military, industry and government
- the project life cycle involves
 - Project Definition (concept definition, justification in terms of needs, objectives and strategy, project description)
 - Planning (schedule, budget, specifications)
 - Implementation (task-work, monitoring performance, taking corrective action)
 - Completion and evaluation (inspection, delivery, evaluation)
- project management skills usually include
 - planning
 - business and marketing planning
 - setting measurable project outcomes and objectives
 - budgeting
 - project management software
 - creativity
 - competitiveness
 - organisation
 - structuring physical resources (selecting the right equipment)
 - structuring financial resources (funding, approvals etc)
 - structuring human resources (organisation design, job design, job specifications)
 - strong “general management” leadership
 - matrix management (multiple responsibilities, coping with working alongside traditional organisational structures)
 - tailoring roles, co-operation and networking
 - flexible contingency planning of resources

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- staffing
 - team selection
 - ability to cope with pressure
 - direction
 - strong management systems (schedules, budgets, quality control)
 - strong motivation and communication
 - control
 - regular inspections, feedback and reporting
 - skill with project management software
 - task and people performance appraisal
 - strong anticipation, focus and problem-solving skills
 - budgeting
 - Meeting Case Study Resources
 - see Handout 1.2 A “Meeting Budget”
 - see Handout 1.2 B “UBD Conference Checklist”
 - see Handout 1.2 C “Budget Planner”
 - see Handout 1.2 D “Meetings Checklist”
 - Notes about Meeting Case Study Resources
 - Handouts 1.2B, C and D are made available by Braynart (a division of Universal Press, which publishes the UBD directories). Consent has been received for these handouts to be freely used and copied for learners of this module.
 - Handout 1.2D is an update of 1.2B.
 - Handout 1.2A may be freely used and copied having been devised by the author of this module
 - a standardised budget framework (like Handouts 1.2A and 1.2C) and meeting check-lists (like Handouts 1.2B and 1.2D) are useful planning and communication tools
 - Handout 1.2A includes a cross-reference to Handout 1.2B.

- Handout 1.2A is structured to facilitate “Marketing Management” thinking. It is helpful to remember that a meeting is essentially a marketing exercise requiring a marketing plan approach. This requires market research, segmentation, targeting and **pricing** on the income side and **product**, **promotion** and administration on the cost side. The 4th P (“place” refers to distribution and is unlikely unless distributors are anticipated).
- Page 1
 - Registration Income - 500 paying guests at an average \$538 each totals \$269,000. Notice the fee structure for early birds etc.
 - Other Income - \$35,000 for sponsorships, exhibitions and grants.
 - Product Cost - Venue and Hospitality costs. Note the Cost Code column to assist the accounting process. Actual Costs can be allocated these codes so that detailed cost reports can be prepared (comparing budgeted and committed figures and budgeted and actual figures). Note also the breakdown between fixed and variable costs. This essential for profit planning and calculating break-even points (ie. how many delegates do we need to break even?)
- Page 2 - Product Costs - guest consumables, speakers, transport, staging, exhibits
- Page 3 - Promotion Costs - direct mail, advertising, promotional material, publicity
- Page 4 - Administration Cost - planning and organisation (note PCO consultancy \$20,000), off-site preparation, on-site administration, completion and Total Costs
- Page 5 - Budget Summary
 - Item No. 1 Income Total,
 - Item No. 2 Product Cost Total
 - Item No. 3 Promotion Cost Total
 - Item No. 4 Administration Cost Total
 - Item 5 - Net Profit \$88,745
 - Item 6 - Contingencies \$72,636
 - Volume contingency - \$26,900 which is 50 delegates less x \$538. Note 2nd column -10% determines the reduced

number of 450 (500 less 10% of 500). The % can be altered on the spread sheet for “sensitivity analysis” purposes.

- Price contingency - \$24,120 which is the 10% fee reduction (shown as a rounded off \$54) x lower volume of 450 delegates. Note the sensitivity variable in column 2.
- Variable Cost contingency - \$12,781 which is a cost increment of 10% of \$127,810 representing \$57 per delegate. Note the sensitivity variable in column 2.
- Fixed Cost contingency - \$8,745 which is a cost increment of 10% of \$87,445 representing \$39 per delegate. Note the sensitivity variable in column 2.
- Item 7 - Net Profit after contingencies \$16,110.
- Item 8 - Profit and Loss Budget in contribution format showing
 - the before contingency situation (total and per delegate)
 - the after contingency situation (total and per delegate)
 - the variation between the before and after contingency situations (total and per delegate)
- Item 9 - Break-even point
 - Note line E - Break-even point
 - the break-even level of income is that point (measured as a %) compared with budgeted income where the contribution produced is equal to budgeted fixed costs
 - in the “before” situation - fixed costs were \$87,445. This means that contribution has to be the same to generate a zero net profit. The level of sales necessary to generate this much contribution is \$150,767 (\$87,445 divided by the contribution margin of .58). Now \$150,767 is 49.6% of \$304,000. And 49.6% of 500 delegates is 248. This can be proved by following the contribution format:-

Income 248 x \$608 (total income)	\$150,784
Contribution @ 58% (rounded off)	87,454
Fixed Costs	87,445

- this is vital information. It means that our registrations can fall to half of budget before we start losing money.
 - Class Exercise 1 (say 30 mins)
 - calculate the break even point for the “after” situation in the same way as above
 - discuss the concept of sensitivity analysis
 - discuss the usefulness of preliminary budgeting to help focus meeting planning effort
- discuss the task skills necessary for budgeting meeting activity
 - spread sheet advantages and skills
 - sensitivity analysis
 - relating budgeting to marketing plans
 - relating budgeting to accounting and performance reporting by cost centre/responsibility area (fundamental to “activity based costing”)
 - relating budgeting to activity check-lists
- Class Exercise 2 (say 3 hours)
 - using spread sheet software set up a file with appropriate entries and formulae to recreate Handout 1.2A
 - amend and discuss changes to key variables (eg price, costs, contingencies)
- Hand out Assignment 1
- equipment selection
 - this relates primarily to audio-visual equipment but could relate to any physical asset being used
 - refer to Handouts 1.2B and 1.2D
 - familiarity with the equipment is a must
 - you have seen it work in demonstration and in practice
 - you have made independent user enquiries
 - you have test-driven it yourself
 - you have posed all the right “what-if” questions

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- you have arranged for back-up technical advice, maintenance and replacement equipment
 - you have ensured speakers are familiar with the equipment and have trained them beforehand if not
 - you are sure the right balance is being planned and delivered for effective communication and motivation
 - an order for equipment should be signed by the project manager to ensure compliance with project planning and budgeting
 - where purchase is anticipated, a feasibility proposal should be prepared
 - priority-setting
 - priorities are set on the basis of project needs
 - an “A” priority is for a task with a high priority, a “B” for medium and “C” for low. The bases for allocating these priorities might be:-
 - time - past (C), present (B) and future (A)
 - number of people affected - few (C), medium number (B), many (A)
 - impetus - say self-imposed (A), system imposed (B), other (C)
 - value (contribution to project objectives)
 - gut feel
 - outcome definition
 - an essential task skill. So many people focus on inputs, issues and tasks that they forget the objectives.
 - an outcome definition is related to broad objectives. It defines the result desired in terms of
 - an event
 - a personal reaction. What effect are we seeking in other peoples attitudes, feelings and/or behaviour. What do we want them to think, feel or do in response to our “input” stimulation.
 - these learning outcomes are an example. They are geared to behavioural objectives about what we want learners to be able to do after training

- outcome definition is crucial in the concept stage, particularly for defining the theme and relating the mission for the meeting in the context of overall industry and/or corporate objectives.
- meeting sizing
 - depends on
 - need, objectives, desired outcomes
 - access
 - financial realities concerning funding the feasibility and planning stages and on the likely level of income and costs for the eventual project
 - availability of physical resources
 - availability of human resources (speaking, management and administration)
 - level of competition from similar organisations
 - level of delegate awareness, interest and value (this must be researched)
 - relates to budgeting (see above). Budgets should be prepared for alternative meeting size scenarios (pessimistic, realistic, optimistic). We must know the break-even meeting size
- site selection
 - refer to Handouts 1.2B and 1.2D
 - for large meetings the location is often the first consideration and the venue second
 - the location must relate to prospective delegate preference. Research is essential, particularly for large annual conventions
 - the main site selection criteria are:-
 - relevance to consumer need
 - availability of experiential and recreational tourism resources
 - physical, natural and man-made attractions
 - access
 - accommodation

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- infrastructure and services
 - venue suitability
 - Class Exercise 3 (say ½ hour)
 - imagine you are the Chairman of a national professional organisation
 - you have been presented with a budget for a meeting (use Handout 1.2A)
 - the only justification for a meeting is that we have one every year
 - you are trying to clarify the rationale for having a meeting and choosing a capital city for the meeting
 - what questions would you like answered?
 - who should get the answers?

Learning Outcome 2

Formulate critical path.

Assessment Criteria

- 2.1 Develop an achievable critical path that takes into account the requirements and constraints of the meeting, including the following components:
- meeting objectives;
 - time frame;
 - budget constraints;
 - availability of resources;
 - human resources;
 - customer needs.
- 2.2 Present a critical path for a meeting, using an appropriate computerised or manual format.
- 2.3 Propose the responsibilities within the critical path and delegate to customer as appropriate.

Content

Formulating a critical path

- this section includes
 - scheduling tasks (assessment criterion 2.1)
 - assigning resources (assessment criterion 2.2)
 - presentation (assessment criterion 2.3)
- Meeting Case Study - handout resources for customer project planning
 - Handout 2.1 A “Budgeted Activity List”
 - Handout 2.1 B “Task Work Sheet”
 - Handout 2.1 C “Meeting Project Master Plan Stages 1-5”
 - Handout 2.1 D “Meeting Project Master Plan Stage 6 Last Month”
 - Handout 2.1 E “Meeting Project Master Plan Stages 1-6 Critical Path”

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- Handout 2.1 F “Meeting Project Master Plan Resource Usage”
 - Meeting Case Study - handout resources for PCO project planning
 - Handout 2.1 G “PCO Sub-project Stage 6 Last Month”
 - Handout 2.1 H “PCO Sub-project Stage 6 Last Week”
 - Handout 2.1 I “PCO Sub-project Stage 6 Last 2 Days”
 - Handout 2.1 J “PCO Sub-project Stage 6 Critical Path”
 - Handout 2.1 K “PCO Sub-project Stage 6 Resource Usage”
 - Handout 2.1 L “PCO Sub-project Stage 6 Weekly To-Do List - Manager”
 - Handout 2.1 M “PCO Sub-project Stage 6 Weekly Cash Flow”
 - what is project management?
 - what is the purpose of project management software?
 - overview of “Microsoft Project 4”
 - this component should be presented in a computer room
 - Class Exercise 2 (3 hours)
 - this component should be presented in a computer room
 - STEP 1 - COMPLETE “BUDGETED ACTIVITY LIST”
 - refer to Handout 2.1 A “Budgeted Activity List” and using the file generated in Class Exercise 1
 - use spread sheet software
 - copy the budget file to a new filename
 - create columns 2 and 3 (“classification” & “cost centre”)
 - prefix all tasks with appropriate cost codes. This is essential as it helps relate tasks back to the budget. We want to keep a strong budgeting and marketing plan hold on activity planning.
 - enter stage codes as follows:-
 - Stage 1 - 2 years out
 - Stage 2 - 1 year out

- Stage 3 - 9 months out
 - Stage 4 - 6 months out
 - Stage 5 - 3 months out
 - Stage 6 - 1 month out (for Customer activities)
 - Stage 6A - 1 month out (for PCO activities)
 - Stage 6B - 2 weeks out (for PCO activities)
 - Stage 6C - 1 week out (for PCO activities)
 - Stage 6D - 2 days out (for PCO activities)
 - Stage 6E - 1 day before (for PCO activities)
 - Stage 6F - meeting day (for PCO activities)
 - Stage 6G - post-conference (for PCO activities)
 - save file, format for printing, print file to look like the handout
 - save to another different filename for use in the next step
 - the reason for referring to “customer” and “PCO” is that we will be preparing a master plan using “elapsed working days” for the whole project and treating the last months activities for the PCO as a sub-project. The latter is a different kind of project and will be in more detail concerning time (in hours), resources and costs. Basically the approach taken is for the master plan to be the main basis for communication and the PCO plan to cover the detailed management in the last month. Both projects will be dynamically linked by Microsoft 4.
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- STEP 2 - COMPLETE “TASK WORK SHEET”
 - refer to Handout 2.1 B “Task Work Sheet”
 - use spread sheet software
 - use the most recently saved file
 - sort rows by “stage”
 - insert additional tasks in the task column (and stage codes)

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- complete the “Plan” column by inserting the words “master “ or “sub-project” (this is optional since it purely for notation)
 - enter proposed responsibility areas (resource names). The idea of the prefix is to maintain a marketing management focus. This is optional for any new project but is recommended for this exercise.
 - assuming the resource named for each task
 - for all “master” tasks enter a duration in days eg 4.1 Preliminary Budget 34
 - for all PCO activities in the last month , “sub-project” tasks, enter a duration in days or hours eg
 - 4.1 Prepare running sheet 2
 - 2.1 Hotel staff trial run 8h (must put the “h” in)
 - enter sequence numbers for each stage (this is only a preliminary sequencing step and so mistakes can be tolerated)
 - sort rows first by stage and then by sequence number
 - insert rows for stage headings
 - save and print
 - in practice this work sheet would be used together with the budget as a basis for planning discussion
 - STEP 3 - ENTER TASK NAMES, DURATIONS & RESOURCES IN MICROSOFT PROJECT 4
 - refer to Handouts
 - Handout 2.1 C “Meeting Project Master Plan Stages 1-5”
 - Handout 2.1 D “Meeting Project Master Plan Stage 6 Last Month”
 - Handout 2.1 G “PCO Sub-project Stage 6 Last Month”
 - Handout 2.1 H “PCO Sub-project Stage 6 Last Week”
 - Handout 2.1 I “PCO Sub-project Stage 6 Last 2 Days”
 - load Microsoft 4 program (MP4)
 - provide learners with a short conducted tour and allow them time to explore

- software aids (quick preview, up and running tutorial, cue card and help features)
- brochures and other resource materials and manuals
- explain the different views, how the split screen feature works (Window/Split and Window/Remove Split) and how scrolling and the zoom icons work. Other features should be explained as we go.
- open a new file “str7comm.mpp”
 - click on File/Summary Information and enter the start date Jan 1 ‘97
 - open the spread sheet file for the “task work sheet”
 - mark and copy the range in the column “Tasks” for all “master” rows
 - switch to MP4 and make sure the mouse pointer is in the top left cell
 - click on Edit/Paste Special and then Paste link and then Text Data. This copies the range into the “Task Name” column. Notice this is a dynamic link (see diagonal mark on each task row). This means if you change the spreadsheet file the MP4 file changes as well. Try making a change and see.
 - in the same way copy
 - the spread sheet “days” column into the “Duration” column
 - the spread sheet “resource” column into the “Resource” column
 - save the file but do not close it.
- open a new file “str7pco.mpp”
 - click on File/Summary Information and enter the start date Jan 1 ‘97
 - open the spread sheet file for the “task work sheet”
 - mark and copy the range in the column “Tasks” for all “sub-project” rows
 - switch to MP4 and make sure the mouse pointer is in the top left cell

- click on Edit/Paste Special and then Paste link and then Text Data. This copies the range into the “Task Name “column.
- in the same way copy the “sub-project range” for the spread sheet “days” column into the “Duration” column
- we are not going to copy the spread sheet “resource” column into the “Resource” column. Instead enter the following resource names (enter any extra rows shown as tasks using the Insert key or Insert/Task)

Stage 6A - 1 Month Out

4.1 Prepare running sheet

1.1 Update registrations, delegates list, hotel update	Manager
2.3 Finalise information materials for insertion into satchels	Clerk 1
4.2 Train registration staff	Clerk 2
Contingency Provision (Manager) Note:- also enter 5d duration	Manager
End Stage 6A Milestone Note:- also enter 0 duration	Manager

Stage 6B - 2 Weeks Out

1.1 Final VIP list to hotels with instructions, update reg'ns & list	
2.1 Confirm hotel hours and duties	Clerk 1
2.4 Organise VIP transport	Manager
2.5 Check weather forecasts	Clerk 2
Contingency Provision (Manager) Note:- also enter 5d duration	Clerk 2
End Stage 6B Milestone Note:- also enter 0 duration	Manager

Stage 6C - 1 Week Out

1.1 Update registrations & delegates list, list to hotel	
2.2 Finalise seating plan	Clerk 1
2.3 Prepare delegate list for satchels	Clerk 1
4.3 Prepare nametags	Clerk 2
2.1 Hotel staff trial run	Casual
2.4 Collect gifts	Manager
2.5 Confirm recreational transport & tours	Clerk 2
2.5 Confirm transport to venue & storage	Clerk 2
Contingency Provision (Manager) Note:- also enter 18h duration	Clerk 2
End Stage 6C Milestone Note:- also enter 0 duration	Manager

Stage 6D - 2 Days Out

2.1 Review plans with hotel management	
2.4 Confirm speakers' travel	Manager
4.3 Confirm arrangements for registration desk	Clerk 2
2.2 Review plans, delegate list, coffee breaks & menus	Manager
2.3 Check, transport to venue & store	Clerk 1
2.4 Rehearsal - entertainment	Clerk 2
2.5 Confirm VIP transport	Manager
3.4 Arrange press coverage	Clerk 2
3.4 Confirm photographer	Manager
4.3 Update nametags	Clerk 1
Contingency Provision (Manager) Note:- also enter 3d duration	Casual
End Stage 6D Milestone Note:- also enter 0 duration	Manager

Stage 6E - Day Before

1.1 Final attendance audit & confirm with venue	
4.1 Double check using check-lists	Manager
4.3 Open registration desk	Clerk 1
2.3 Unstore materials and fill satchels	Clerk 1
2.7 Set up exhibit area	Clerk 2
4.3 Copy room layout plans for staff	Manager
2.4 Contact speakers	Clerk 2
2.4 Contact speakers' guests & VIPs	Clerk 1

2.6 Check audio & brief technician	Clerk 1
3.4 Opening news conference	Manager
Contingency Provision (Manager) Note:- also enter 1h duration	Manager
End Stage 6E Milestone Note:- also enter 0 duration	Manager
Stage 6F - Conference Day	
2.1 Final check meeting room set-up	
4.3 Check all signage is in place	Manager
2.2 Final check hospitality room set-up	Clerk 2
2.6 Final check - audio	Manager
2.6 Final check - visual	Manager
2.4 Final speakers' briefing	Manager
Contingency Provision (Manager) Note:- also enter 1h duration	Manager
End Stage 6F Milestone Note:- also enter 0 duration	Manager
Stage 6G - Post-conference	
2.7 Dismantle exhibits & transport	
2.3 Transport unused delegate materials	Clerk 1
2.6 Pick up & return audio equipment	Clerk 2
2.6 Pick up & return visual equipment	Manager
2.1 Venue critique & feedback	Manager
2.3 Prepare transcripts & send to delegates	Manager
Contingency Provision (Manager) Note:- also enter 5d duration	Clerk 1
End Stage 6G Milestone Note:- also enter 0 duration	Manager

- save the file but do not close it
- make sure by clicking Window you can switch between MP4 files
- STEP 4 - ENTER TASK SEQUENCING IN MICROSOFT PROJECT 4
 - switch to str7comm
 - go to Stage 6
 - enter new row called "Committee Work"
 - enter the last row called "PCO PLAN SUB-PROJECT"
 - click on the information icon (or Insert/Task Information), click on Advanced and in the Sub-Project field enter the path to the file str7pco eg c:\winproj\str7pco.mpp
 - now str7pco is dynamically linked to str7comm
 - insert 2 rows at the end of each stage (click on Insert/Task)
 - Contingency Provision (allow default 1 day)
 - Stage x (insert relevant number) Complete Milestone (change the default 1 day to zero to make the activity a milestone)
 - go to ID2 row and click right arrow indent icon (or Tools/Outlining/Indent), notice how the Stage 1 row becomes bold

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- using the mouse (or shift/down arrow keys) mark out the range ID3-ID11 and indent
 - follow same procedure for remaining stages
 - in Stage 6 indent rows 74-84 again to reveal rows 73 and 85 as higher level indents
 - mark out the whole range and click on the link tasks icon (or Edit/Link Tasks). This links every task to a preceding task.
 - pause and look at how the bar chart with its link lines is taking shape
 - experiment with the different views and split screens
 - explain what a PERT chart is displaying
 - now to enter the right sequence of activities in the “predecessors” column as follows

Stage 1 - Long Term - 2 years out

4.1 Committee, objectives, theme, topics, speakers, date
(Note:- number not entered means it starts from the project start date already set in File/Summary Information)

1.1 Budget Assumption - no. of registrants 2

1.2 Identify sponsor prospects 2

1.3 Identify exhibitor prospects 2

4.1 Preliminary budget 8

2.1 Select & negotiate - venue requirements 2

2.2 Negotiate hospitality requirements 90d 2

2.4 Invitations to speakers 2

Contingency Provision 6 (note make the duration 77 days)

Stage 1 Complete Milestone

Stage 2 - Medium Term - 1 year out 1 (note this number is already automatically entered as a link to the previous stage and this means that work will not start on this stage until all the work in the preceding stage has been completed. This is an implicit link)

2.7 Design promotional campaign (note:-no number entered which automatically links task to end of previous stage)

3.1 Exhibition brochure- design, quotes & select printer 13

3.1 Fliers - design, quotes & select printer 13

3.1 Programme/brochure design, quotes & select printer 13

3.1	Registration Form - design, quotes & select printer	13
1.2	Solicitation - sponsorships (note:-no number entered which automatically links task to end of previous stage)	
1.3	Exhibition budget	14
2.2	Menu selection (note:-no number entered which automatically links task to end of previous stage)	
2.3	Plan nametag holder	20
2.3	Plan satchels	21
2.4	Book entertainment	22
2.4	Plan appropriate programme -spouses & children	23
2.5	Identify transport requirements & bookings	24
2.5	Plan recreational programme, book tours	25
2.5	Plan technical site visits	26
3.1	Booster - design & produce	13
4.1	Invite VIP's, revised budget	28
4.2	Organise cheque and credit card facilities	28
	Contingency Provision	30 (note make the duration 29 days)
	Stage 2 Complete Milestone	

Stage 3 - Short Term - 9 months out 12 (note this number is already automatically entered as a link to the previous stage and this means that work will not start on this stage until all the work in the preceding stage has been completed. This is an implicit link)

2.4	Confirm speakers (note:-no number entered which automatically links task to end of previous stage)	
1.3	Exhibitor confirmation (note:-no number entered which automatically links task to end of previous stage)	
1.1	Finalise registration fees (note:-no number entered which automatically links task to end of previous stage)	
1.2	Follow up sponsorship (note:-no number entered which automatically links task to end of previous stage)	
3.1	Post fliers	37
2.4	Select gifts	38
2.6	Confirm speakers' audio requirements	39
2.6	Confirm speakers' visual requirements	40
4.1	Revise budget	37
3.4	Arrange photographer	41
	Contingency Provision	43 (note make the duration 36 days)
	Stage 3 Complete Milestone	

Stage 4 - Short Term - 6 months out 33 (note this number is already automatically entered as a link to the previous stage and this means that work will not start on this stage until all the work in the preceding stage has been completed. This is an implicit link)

3.2 Arrange targeted advertising (note:-no number entered which automatically links task to end of previous stage)

1.1 Organise registration system (note:-no number entered which automatically links task to end of previous stage)

1.2 Finalise sponsors (note:-no number entered which automatically links task to end of previous stage)

1.3 Finalise exhibitors 49

2.3 Organise door prizes 50

2.4 Obtain speakers' notes, send copy programme 51

2.5 Survey attractions brochures 52

3.1 Programme/brochure - printing (note:-no number entered which automatically links task to end of previous stage)

3.1 Registration Form - printing (note:-no number entered which automatically links task to end of previous stage)

4.2 Plan insurance 48

4.2 Plan licenses 56

4.2 Plan security 57

4.1 Revise budget 58

Contingency Provision 59 (note make the duration 16 days)

Stage 4 Complete Milestone

Stage 5 - Short Term - 3 months out 46 (note this number is already automatically entered as a link to the previous stage and this means that work will not start on this stage until all the work in the preceding stage has been completed. This is an implicit link)

3.1 Send out registration & brochure (note:-no number entered which automatically links task to end of previous stage)

3.4 Plan press statements (note:-no number entered which automatically links task to end of previous stage)

1.3 Finalise exhibitor arrangements & signage (note:-no number entered which automatically links task to end of previous stage)

1.1 Record responses & hotel bookings 63

2.6 Plan audio 66

2.6 Plan visual 67

4.3 Organise on-site signage 68
 Contingency Provision 69 (note make the duration 3 days)
 Stage 5 Complete Milestone

Stage 6 - Last month 62 (note this number is already automatically entered as a link to the previous stage and this means that work will not start on this stage until all the work in the preceding stage has been completed. This is an implicit link)

Committee Work (leave blank)

2.1 Confirm room details at venue (note:-no number entered which automatically links task to end of previous stage)

2.2 Confirm menu details (note:-no number entered which automatically links task to end of previous stage)

2.4 Confirm speakers' details, distribute speakers' instructions
 75

4.3 Organise equipment hire 76

4.3 Organise telephone/fax 77

2.4 Finalise contingency plan for speakers 78

3.4 Press release 79

2.3 Finalise materials for delegates & confirm supply 80

4.4 Thank-you letters 84

4.2 Verify & pay accounts 85

4.1 Final evaluation & reports, committee meeting 83

PCO PLAN SUB-PROJECT (Note:- There is no contingency provision or milestone in the master project because they are in the sub-project and therefore automatically accounted for in the master project. Also do not enter or change the duration number, this is picked up automatically from the Str7pco file.)

- make sure the Gantt entry view is on (View/Gantt Chart & then View/Table/Entry)
- click on Window /Split
- click on left vertical bar on left of screen in bottom window
- click on View/More views/Task Details Form
- click on the Stage 1 Complete Milestone row and in the bottom pane change the constraint field to “Must Finish On” and in the date field below enter the date Dec 31 '97
- do the same for each other milestone row
 - Stage 2 must finish on Mar 31 '98
 - Stage 3 must finish on Jun 30 '98

-
- Stage 4 must finish on Sep 30 '98
 - Stage 5 must finish on Nov 30 '98
 - Important. Do not change the constraint dates for any other tasks. Leave them all as “As Soon as Possible”.
 - Important. Do not change or enter any other dates on the Task Details Form, Gantt Entry view or on any other view. Let the program work them out. If you change them they automatically become fixed dates and will not change automatically as you vary duration times when you are planning or re-planning the project
 - save file
 - switch to str7comm
 - go to top row, insert new task called “PCO SUB-PROJECT” . This becomes a summary line for the PCO file. Do not enter a duration.
 - remember str7pco is dynamically linked to str7comm
 - make sure you have 2 rows at the end of each stage (click on Insert/Task to enter if not already entered)
 - Contingency Provision (duration's as specified in Step 3)
 - Stage x (insert relevant number) Complete Milestone (make sure the duration is zero to make the activity a milestone)
 - go to ID2 row and click right arrow indent icon (or Tools/Outlining/Indent), notice how the PCO Sub-project row becomes bold
 - using the mouse (or shift/down arrow keys) mark out the range ID3-ID8 and indent
 - follow same procedure for remaining stages
 - mark out the whole range and click on the link tasks icon (or Edit/Link Tasks). This links every task to a preceding task.
 - pause and look at how the bar chart with its link lines is taking shape
 - now to enter the right sequence of activities in the “predecessors” column as follows

PCO SUB-PROJECT
 Stage 6A - 1 Month Out
 4.1 Prepare running sheet

1.1 Update registrations, delegates list, hotel update	3
2.3 Finalise information materials for insertion into satchels	4
4.2 Train registration staff	5
Contingency Provision (Manager)	6
End Stage 6A Milestone	
Stage 6B - 2 Weeks Out	2
1.1 Final VIP list to hotels with instructions, update reg'ns & list	
2.1 Confirm hotel hours and duties	10
2.4 Organise VIP transport	11
2.5 Check weather forecasts	12
Contingency Provision (Manager)	13
End Stage 6B Milestone	
Stage 6C - 1 Week Out	9
1.1 Update registrations & delegates list, list to hotel	
2.2 Finalise seating plan	17
2.3 Prepare delegate list for satchels	
4.3 Prepare nametags	
2.1 Hotel staff trial run	
2.4 Collect gifts	19
2.5 Confirm recreational transport & tours	22
2.5 Confirm transport to venue & storage	23
Contingency Provision (Manager)	21
End Stage 6C Milestone	
Stage 6D - 2 Days Out	16
2.1 Review plans with hotel management	
2.4 Confirm speakers' travel	
4.3 Confirm arrangements for registration desk	28
2.2 Review plans, delegate list, coffee breaks & menus	30
2.3 Check, transport to venue & store	29
2.4 Rehearsal - entertainment	30
2.5 Confirm VIP transport	32
3.4 Arrange press coverage	33
3.4 Confirm photographer	31
4.3 Update nametags	
Contingency Provision (Manager)	35
End Stage 6D Milestone	
Stage 6E - Day Before	27
1.1 Final attendance audit & confirm with venue	
4.1 Double check using check-lists	
4.3 Open registration desk	42
2.3 Unstore materials and fill satchels	
2.7 Set up exhibit area	41
4.3 Copy room layout plans for staff	44
2.4 Contact speakers	43
2.4 Contact speakers' guests & VIPs	47
2.6 Check audio & brief technician	45
3.4 Opening news conference	49
Contingency Provision (Manager)	50
End Stage 6E Milestone	
Stage 6F - Conference Day	40
2.1 Final check meeting room set-up	
4.3 Check all signage is in place	
2.2 Final check hospitality room set-up	54
2.6 Final check - audio	56
2.6 Final check - visual	57
2.4 Final speakers' briefing	58
Contingency Provision (Manager)	59
End Stage 6F Milestone	
Stage 6G - Post-conference	53

2.7 Dismantle exhibits & transport	
2.3 Transport unused delegate materials	
2.6 Pick up & return audio equipment	
2.6 Pick up & return visual equipment	65
2.1 Venue critique & feedback	66
2.3 Prepare transcripts & send to delegates	63
Contingency Provision (Manager)	67
End Stage 6G Milestone	

- make sure the Gantt entry view is on (View/Gantt Chart & then View/Table/Entry)
- click on Window /Split
- click on left vertical bar on left of screen in bottom window
- click on View/More views/Task Details Form
- click on the Stage 6A Complete Milestone row and in the bottom pane change the constraint field to “Must Finish On” and in the date field below enter the date Dec 15 '98
- do the same for each other milestone row
 - Stage 6B must finish on Dec 22 '98
 - Stage 6C must finish on Dec 28 '98
 - Stage 6D must finish on Dec 29 '98
 - Stage 6E must finish on Dec 30 '98
 - Stage 6F must finish on Dec 31 '98
 - Stage 6G must finish on Jan 11 '99
- Important. Do not change the constraint dates for any other tasks. Leave them all as “As Soon as Possible”.
- Important. Do not change or enter any other dates on the Task Details Form, Gantt Entry view or on any other view. Let the program work them out. If you change them they automatically become fixed dates and will not change automatically as you vary duration times when you are planning or re-planning the project.
- save file
- STEP 5 - IDENTIFY THE CRITICAL PATH IN MICROSOFT PROJECT 4
 - refer to Handouts 2.1C, 2.1D, 2.1G, 2.1H, 2.1I used above
 - for each file click on the Filter dialogue box and select “Critical” (the filter box is on the Formatting toolbar between the outlining icons and the font dialogue box)
 - the program has worked out the critical path which is the sequence of tasks that must finish on schedule for the overall project to finish on time. A critical task is a task which, if its finish date were delayed, would delay the finish date of the project.
 - note the technique used for “Contingency” tasks. These are to allow for unforeseen activities and represent a cushion between

the last estimated real task in the stage and the fixed milestone date. If these duration's are changed the finish date for that stage will vary from the milestone date.

- notice that on the handouts all the critical tasks appear
 - as text in bold. To do this
 - choose all tasks from the filter box
 - click on Format/Text Styles/Item to Change/Critical Tasks and change to bold.
 - as bars in wider bars with vertical patterns. To do this
 - click on Format/Bar Styles and select “Critical Tasks” then click on the Bars Tab and change the size, pattern and colour (say red) to suit.
 - make the non-critical bars thinner, solid and a different colour (say blue)
 - with the word “yes” at the end of the bar (or the word “no” at the end of all the non-critical bars. To do this
 - click on Format/Bar Styles and select “Critical Tasks” then click on the Text Tab
 - Click on Right and then click on the arrow icon on the long bar above which opens up a dialogue box and choose Critical
- refer to handouts
 - Handout 2.1E “Meeting Project Master Plan Stages 1-6 Critical Path”
 - Handout 2.1 “PCO Sub-Project Stage 6 Critical Path”
- to see these views on the screen click on View/Reports/Overview/Critical Tasks for each file
- notice how these views provide successor task names to help work out the consequences of changing the duration of a critical task
- click on View/Pert and use the zoom icons to see the Pert Network. This corresponds to the Gantt bar chart with links displayed
- click on View/Gantt and then View/Table/Entry
- click on Window/split
- click on left bar on lower pane and then click on View/More Views/Task PERT then see how the PERT display changes as you click on different tasks in the upper pane
- STEP 6 - PRINTING REPORTS IN MICROSOFT PROJECT 4
 - Critical Path Lists
 - re-create Handout 2.1E
 - switch to file Str7comm
 - click on View/Reports/Overview/Critical Tasks

-
- choose Select (to print)
 - re-create Handout 2.1J
 - switch to file Str7pco
 - click on View/Reports/Overview/Critical Tasks
 - choose Select (to print)
 - Gantt Charts
 - re-create Handout 2.1C
 - open Window/Str7comm
 - make sure you have a full view (no splits)
 - click on filter box and set Task Range from ID1 to ID71
 - click on entry pane (left hand pane)
 - make sure duration and resource columns are displayed. Note other columns can be hidden and unhidden using the mouse by clicking next to the column and dragging the column line to suit
 - make sure the double line on the left of the right pane (Gantt chart view) is dragged to the right hand side of the resource column
 - click on zoom (smaller) to make sure the bars are displayed for the right period
 - click on Format/Timescale and change Major and Minor time scales to match the column headings on the handout
 - put start and finish dates on the summary task bars by clicking on
 - Format/Bar Styles/Summary Tasks
 - then click on Bar tab/Right/Arrow/Finish
 - then click on Left/Arrow/Start
 - put milestone dates on bars by clicking on
 - Format/Bar Styles/Milestones
 - then click on Bar tab/Right/Arrow/Finish
 - to print click on File/Print and change the dates to start from Jan 1 '97 and finish at an appropriate date to match the last task. Click on preview to see how well the columns are fitting. Change page format to suit (eg margins and make legend "no"). If everything looks OK in Print Preview then print. Note you can also preview by clicking the Preview icon.
 - re-create Handout 2.1D
 - click on filter box and set Task Range from ID72 to ID85

- click on zoom (larger) to make sure the bars are displayed for the right period
- click on Format/Timescale and change Major and Minor time scales to match the column headings on the handout
- to print click on File/Print and change the dates to start from Dec 1 '98 and finish at an appropriate date to match the last task (try Jan 27 '99). Click on preview to see how well the columns are fitting. Change page format to suit (eg margins and make legend "no"). If everything looks OK in Print Preview then print.
- re-create Handout 2.1G
 - open Window/Str7pco
 - make sure you have a full view (no splits)
 - click on filter box and set Task Range from ID1 to ID70
 - click on entry pane (left hand pane)
 - make sure duration and resource columns are displayed. Note other columns can be hidden and unhidden using the mouse by clicking next to the column and dragging the column line to suit
 - make sure the double line on the left of the right pane (Gantt chart view) is dragged to the right hand side of the resource column
 - click on zoom (smaller) to make sure the bars are displayed for the right period
 - click on Format/Timescale and change Major and Minor time scales to match the column headings on the handout
 - put start and finish dates on the summary task bars by clicking on
 - Format/Bar Styles/Summary Tasks
 - then click on Bar tab/Right/Arrow/Finish
 - then click on Left/Arrow/Start
 - put milestone dates on bars by clicking on
 - Format/Bar Styles/Milestones
 - then click on Bar tab/Right/Arrow/Finish
 - to print click on File/Print and change the dates to start from Dec 1 '98 and finish at an appropriate date to match the last task (try Jan 20 '99). Click on preview to see how well the columns are fitting. Change page format to suit (eg margins and make legend "no"). If everything looks OK in Print Preview then print. Note you can also preview by clicking the Preview icon.
- re-create Handout 2.1H

-
- click on filter box and set Task Range from ID16 to ID61
 - click on zoom (larger) to make sure the bars are displayed for the right period
 - click on Format/Timescale and change Major and Minor time scales to match the column headings on the handout
 - to print click on File/Print and change the dates to start from Dec 1 '98 and finish at an appropriate date to match the last task (try Dec 31 '98). Click on preview to see how well the columns are fitting. Change page format to suit (eg margins and make legend “no”). If everything looks OK in Print Preview then print
 - re-create Handout 2.1I
 - click on filter box and set Task Range from ID27 to ID52
 - click on zoom (larger) to make sure the bars are displayed for the right period
 - click on Format/Timescale and change Major and Minor time scales to match the column headings on the handout
 - to print click on File/Print and change the dates to start from Dec 29 '98 and finish at Dec 30 '98). Click on preview to see how well the columns are fitting. Change page format to suit (eg margins and make legend “no”). If everything looks OK in Print Preview then print.
 - Resource Usage Lists
 - refer Handouts 2.1F and 2.1K
 - in each file click on Views/Reports/Workload/Select/Resource Usage/Select
 - Weekly Cash Flow Reports
 - refer Handout 2.1M
 - click on View/Reports/Costs/Select/Weekly Cash Flow/Select

Learning Outcome 3

Implement the critical path.

Assessment Criteria

3.1 Justify the arrangements for the meeting requirements, taking into account of the objectives from learning outcome 1 and the critical path from learning outcome 2. Meeting arrangements may include:

- supplier arrangements;
- presenter arrangements;
- consultants;
- slide and A/V production;
- bookings;
- confirmations;
- printing and kit production;
- advertising;
- promotion and promotional materials;
- venue inspection and selection;
- contingency arrangements;
- sponsor arrangements.

3.2 Use the interpersonal skills necessary for the successful implementation of a critical path, including:

- organisational skills;
- time management;
- forward planning;
- flexibility;
- problem solving skills.

Content

3.1 Implementing Tasks

These items are covered in other learning modules. For the purpose of this learning module, only the following key points should be presented and developed

- suppliers
 - define and specify needs
 - obtain quotes
 - evaluate quotes
 - approval and purchase order
 - regular follow-up
 - inspect/check supply
 - supervise supply
 - approve for payment
 - evaluation
- presenters
 - relevance
 - authority and credibility
 - style, delivery impact
 - select from observation, video, audio-tape and/or notes, press articles, papers etc
 - cost
 - call for abstracts and/or papers
 - ask for audio-visual needs
- consultants
 - types
 - PCO (professional conference manager)
 - market research

- technical
 - travel
 - promotion
 - professional exhibition organisations
- contracts
 - clear brief
 - capability statements and quotes
 - evaluate quotes
 - purchase order with clear terms and conditions regarding key staff, schedule, progress claims, reporting, communication etc
 - team meetings
 - final report and evaluation
- slide and A/V production
 - level of sophistication depends on
 - speakers specifications
 - delegate/organisational needs
 - for impact on developing AIDA.....awareness, interest, desire and action
 - to meet advertised promises and delegate expectations ie. Will the identity match the image? Will the delivery match the promise?
 - budget
- bookings
 - registration forms should include
 - name, address, occupation, telephone/fax details, hotel and accommodation preference and dates, method of payment
 - delegate profile information to help speakers (eg occupation details, interest in topics)
 - workshop preferences, dietary preferences

-
- languages and language preferences
 - preferred name for name-card
 - accompanying persons details
 - disability information
 - travel details
 - method of payment, deposit etc
 - session and workshop preferences
 - social programme, tour preferences
 - terms and conditions (eg cancellations)
 - devise a suitable bookings system to act as a database for all activities
 - confirmations
 - appropriate details as per registration
 - receipts
 - tickets etc
 - further details regarding programme and special needs
 - contact particulars
 - update bookings database
 - printing and kit production
 - handbooks usually contain
 - daily programme of events
 - abstracts of papers
 - welcome
 - relevant details re committees, office-bearers etc
 - conference information (meals, tea & coffee facilities, bar, transport etc)
 - advertising

- advertising in member and professional journals
- must set clear communication objectives beforehand
- promotion and promotional materials
 - brochure should contain
 - name, dates, venue
 - topics, speakers details, session times
 - social functions, accompanying persons programme, pre & post tour information
 - sponsors
 - theme message from leadership, committee structure
 - maps, floor layouts
 - transport, dress, air fare specials
 - accommodation, international requirements
 - registration details, exhibition details
 - other promotional tools include posters, fliers, press articles, announcements to members at earlier functions, direct mail etc
- venue inspection and selection
 - sizing constraints (attendance numbers, number and format for break-out, plenary and workshop sessions)
 - location (attractiveness, access, proximity to accommodation)
 - facilities for audio-visual, exhibitions, entertainment, recreation etc
 - service and price
- contingency arrangements
 - referred to in the project management sections (budget and schedule) above and in section 4 below
 - ensure responsibility allocation
- sponsor arrangements
 - types

-
- financial
 - discounted air fares
 - for coffee breaks, meals, transport, printing, satchels etc
 - prospecting
 - look for organisations with complementary activities
 - research well before contacting
 - high level entry
 - key committee responsibility
 - contact
 - sell the numbers involved and promotional programme
 - sell the benefits and value for the sponsor
 - explain the type and frequency of sponsor references
 - sponsor references and benefits
 - acknowledgment in publications
 - logos, captions, signage, posters
 - editorials, media coverage
 - mailing sponsor literature
 - copy of registration details
 - exhibition arrangements
 - complimentary delegate attendance
 - personal introductions to official guests, speakers and key delegates
 - make sure the whole package (including terms of payment) is documented in a sponsorship offer and accepted formally

3.2 Interpersonal skills for task implementation

- organisation

- this relates to organising your own work as project co-ordinator and that of your team-members and subordinates
- the broad objectives and responsibilities have already been set
- tasks and resource assignments have already been made in the project plan
- detailed activities in relation to each task need to be planned and this is the responsibility of each responsible member
- what remains to be organised
 - resources to meet problems in implementation
 - project meetings at appropriate times
 - your own personal work
- time management
 - as project co-ordinator your time might be the critical resource
 - you either manage time (the pro-active manager) or let time manage you (the re-active manager)
 - forethought (see next section) can avoid time-wasting activity. Signs of time-wasting because of a lack of planning include continual urgency, crisis meetings, inter-personal friction and blaming
 - monitor how time was spent, perhaps using time sheets or a daily log.
 - monitor how time will be spent, perhaps using do-lists for the day or a good diary and/or personal information manager
 - prioritise
 - do the most demanding activities in that part of the day when you are most productive
 - do like tasks in sequence or at the same time
 - go and have a look first hand. Get live feed-back.
 - leave some time for reflection, focus, creativity and perspective
 - delegate
 - eliminate time wasting visitors, meetings and similar intrusions
- forward planning

-
- go over the schedules and budgets
 - anticipate likely problems
 - develop contingency alternatives
 - flexibility
 - this relates to flexibility in leadership style depending on the type of situation
 - flexible response planning (contingencies etc)
 - testing the relevance of the task to present needs. When the task was first planned it may have been necessary. In the light of present circumstances and new information it might be better amended or eliminated (or even expanded)
 - since the task was first conceived, approved and assigned, someone (perhaps the present incumbent) may have come up with a better way
 - the key skills here are a strong task hold on the overall objectives and outcomes and problem-solving ability
 - problem solving skills
 - these skills are relevant to planning and decision-making processes.
 - Step 1 - Recognition of the problem (or opportunity)
 - A problem is a deviation from standard. This presupposes that a desired state (standard, target or objective) exists and therefore the actual state is at variance with this....hence the awareness of a problem.
 - The desired state in many cases relates to needs, eg consumer needs. Needs provide the rationale for objectives.
 - Look beyond symptoms for a cause.
 - Conduct a situation appreciation to become familiar with the facts about the environment, context and variables related to the problem. What happened? When and how? Who was involved? Why did it happen?
 - Step 2 - Definition of the problem (or opportunity)
 - Probe until real problem is exposed, question the evidence
 - Attempt alternative definitions

- From the selected definition establish the objective(s), constraints and criteria for evaluating the alternatives and guiding the problem-solving process and the implementation.
- Step 3 - Define the alternatives
 - Search using experience, consultation, historical records, competitive situations, etc.
 - Encourage creativity using lateral thinking including brainstorming group sessions.
- Step 4 - Evaluate the alternatives
 - Make predictions about impacts, inputs and outcomes.
 - Quantify as much as possible.
 - Use the pre-determined criteria (see above) eg. Profitability, time, cost and /or quality standards
- Step 5 - Selection
 - Which alternative best meets the criteria.
 - Allow for judgment, acceptable risk and personal experience, etc.
 - Question the evidence.

Learning Outcome 4

Formulate contingency plans and make the necessary adjustments to the critical path.

Assessment Criteria

- 4.1 Propose a plan for appropriate contingency measures for the meeting given a list of identified problems. Contingencies include:
- budget over-run;
 - weather;
 - speaker unavailability;
 - supplier problems;
 - cancellations.
- 4.2 Record contingency measures onto the critical path and adjust the critical path accordingly.
- 4.3 Justify the necessary steps to be taken when the need for contingency measures arises. Operational requirements for changing arrangements may include:
- informing suppliers;
 - informing clients;
 - rescheduling;
 - staffing.

Content

4.1 Contingency Planning

- budget over-runs, weather, speaker unavailability, supplier problems and cancellations etc can all have a deleterious effect on the project, sometimes fatal without some form of contingency planning
- the first steps are to ask
 - “what haven’t we thought of?” . Very often it is not what you thought of that brings you down but what you haven’t thought of.
 - “what could go wrong?”
- go over the check-lists

- check the plan and schedule with someone experienced and let them play “devils advocate”
- test for relevance against needs, business and marketing plans
- double-check everything if you can
- insist on training
- do trial runs
- see contingency costing (in budgeting section)
- see contingency time planning in preceding and following computer project management software sections
- options to correct falling behind
 - recover time/cost on later tasks
 - expand resources
 - change supply
 - substitute materials
 - substitute suppliers
 - accept partial delivery
 - demand compliance
 - renegotiate with the client
 - request more time, money or lower quality requirements
 - narrow the project scope

4.2 Plan Modification

- the plans generated in Microsoft Project 4 can be easily modified. At some point however the whole plan (or certain stages of it) will be approved and then will be used as a basis (or baseline) for comparing with actual progress.
- entering actual performance and measuring (and reporting on) progress in Microsoft Project 4 incorporating plan modification
 - refer to
 - Handout 3.1 A “Meeting Project Baseline Table Stages 1-5”

-
- Handout 3.1 B “Meeting Project Progress”
 - Handout 3.1 C “PCO Sub-project Baseline Plan”
 - Handout 3.1 D “PCO Sub-project Project Progress”
 - Handout 3.1 E “PCO Sub-project Slipping Tasks”
 - Handout 3.1 F “PCO Sub-project Actual Weekly Cash Flow”
 - using Microsoft Project 4 open str7comm and save as str7coma and then open str7pco and save as str7pcoa
 - in each file
 - create a baseline table (see Handouts 3.1A and 3.1C)
 - click on Tools/Tracking/Save Baseline/Entire Project. From now on each task will have two bars, a baseline bar (representing the budgeted time duration) and an actual bar. This is a necessary first step before we can record actual times and dates etc
 - click on View/Toolbars/Tracking/Close. This displays the tracking toolbar.
 - click on View/More Views/Tracking Gantt. See how the two bars are displayed, one for the baseline plan and the other for the actual.
 - switch to file Str7coma
 - have Handouts 3.1A and 3.1B by your side
 - click on View/Gantt and then View/Table/Tracking
 - change the duration’s (except for “Contingency Provision” for Stage 1 to match Handout 3.1B
 - click on View/Gantt/Entry
 - notice how the Contingency task now goes past the milestone date. This is unacceptable. Fortunately we can use up the contingency first. Change the baseline plan duration for the contingency to 54 days and the project is back on track. Alternatively we would have to have put pressure on the other tasks.
 - change the duration’s back to match Handout 3.1A
 - go back to View/Gantt and then View/Table/Tracking

- now try changing the % fields to match Handout 3.1B and not the duration's. Change views to see the result. Save the file and print a report to match the handout..
- experiment with other entries not on the Handouts (do not save during this process)
 - tracking entries (entering actual progress etc)
 - make sure the tracking view is on screen (if not click on to View/Gantt and then View/Table/Tracking)
 - try entering some % or duration's for other tasks
 - try entering some actual starting and finishing dates
 - plan modification entries
 - make sure the baseline view is on screen (if not click on to View/Gantt and then View/Table/Entry)
 - try modifying the baseline plan duration's for some tasks, noticing how the bars change
 - Close file without saving.
- switch to file Str7pcoa
 - have Handouts 3.1C, and 3.1D (2 pages) by your side
 - click on View/Gantt and then View/Table/Tracking
 - change the % for Stage 1 to 100% to match Handout 3.1D
 - change the duration for ID10 (Final VIP list.....) to 18h. Notice how some of the tasks now become critical.
 - print a report to re-create Handout 3.1E "Slipping Tasks" by clicking on View/Reports/Current Activities/Slipping Tasks/Select
 - print a report to match Handout 3.1F "Actual Weekly Cash Flow". Notice the change compared with Handout 2.1M.
 - click on View/Gantt/Entry
 - notice how the Contingency task now goes past the milestone date. This is unacceptable. Fortunately we can use up the contingency first. Change the duration for contingency to 8h and the project is

back on track. Alternatively we would have to have put pressure on the other tasks.

- make sure the duration's match Handout 3.1D (2nd page)
- Save the file and print the report to match the Handout.
- experiment with other entries not on the Handouts (do not save during this process)
 - tracking entries (entering actual progress etc)
 - make sure the tracking view is on screen (if not click on to View/Gantt and then View/Table/Tracking)
 - try entering some % or duration's for other tasks
 - try entering some actual starting and finishing dates
 - plan modification entries
 - make sure the baseline view is on screen (if not click on to View/Gantt and then View/Table/Entry)
 - try modifying the baseline plan duration's for some tasks, noticing how the bars change
 - try changing resources
 - choose a task with Clerk 1 in the resource column. Click on the resource cell, press F2, add a comma, type in Clerk 3, press Enter. Click on the Resource icon (the one with two heads) and see that Clerk 3 has been added to this task. This will not change the duration but it will double the work hours for this task. Because we now have double the resources we can now halve the duration cell entry.
 - click on Window/Split Window and change the bottom pane to View/Resource Graph and to see how over-allocations can be displayed. Change the lower pane to View/Resource Usage

- explain the concept of resource allocation, resource levelling to eliminate over-allocations, changing resources to allow for longer days etc
- examine the views in View/Reports (assignments and workloads)
- Close file without saving.

4.3 Implementing Contingency Measures

- **informing suppliers**
 - discuss contingency alternatives
 - resolve terms and conditions for preferred solution
 - establish appropriate documentation (same as for purchase, see section 3 above)
- **informing clients**
 - discuss need for contingency arrangements and alternatives
 - approve preferred arrangement
- **rescheduling and staffing**
 - see 4.2 above for changes to the plan and for entering actual performance

Assignment 1- Budget Spread Sheet

- prepare a spread sheet file and report similar to Handout 2.1A in accordance with the following
 - 200 paying guests, 5 free guests
 - a range of fees to produce a net profit of \$10,000
 - sensible variable and fixed costs
 - break-even point
 - no contingency allowances (but provision for some)
 - a 1 day conference
 - a PCO management fee of \$5,000
- prepare a separate file and report including amendments for contingencies
- devise a separate file and report containing Committed, Budget and Variation columns. Assume most activities have been negotiated with firm commitments. The aim is to show how the project is likely to perform compared to budget. This report would be done before the booster promotion and any changes to pricing etc to try to correct any negative prospects.
- devise a separate file and report containing Actual, Budget and Variation columns. Assume all activities have been completed and accounted for. The aim is to show how the project has perform compared to the first budget. As an alternative the “Committed” column may be used in place of the “Budget” column.

Assignment 2 -Computer Project Planning

- prepare new files based on Str7comm and Str7pco named as Str7comb and Str7pcob respectively
- set up a baseline plan for each file
- amend the baseline plans with the following changes
 - change the resource name for any two tasks to a new resource
 - add a new resource to one task and amend the duration accordingly
 - add a new task for each stage and amend the contingency provisions accordingly
 - change the milestone dates so that the conference will be held on Jan 15 '99 rather than Dec 31 '98 and the final completion date will be Feb 15 '99
 - add a market research task of 10 days after the meeting date

- make sure that the completion dates for each stage do not exceed the milestone dates
- using the tracking facilities, enter actual progress for all stages
 - change at least 5 starting dates
 - change at least 3 finishing dates
 - change most duration's (or % completed or remaining) with all tasks up to and including the actual meeting date as 100% completed
 - present appropriate reports as at Jan 16 '99

Examination

- Define the role of a PCO for project co-ordination
- Describe the value of project management software for establishing a project plan
- What alternatives are there to modify a plan. Describe how these may be achieved in project management software
- What is the relationship between business planning, marketing planning, budgeting and project scheduling

What generic management skills are essential for project co-ordination in the meetings industry