

Portfolio,
Programme & Project

Planning and Execution

Caravel Group
- Project
Management
with a total
focus on value

Starting with the End in Mind

When organisations embark on projects, they strive for successful outcomes. This means well conceived and planned projects that are completed on time and within budget while also delivering the required strategic objectives.

But despite best intentions and clear objectives, organisations are often faced with increased project costs, delayed business benefits or even project failure.

A professional approach to project planning and execution can avoid unscheduled outcomes through the application of specialist skills and knowledge. This ensures that projects are managed more effectively with less crisis management and effective communication between stakeholders, management and the project manager.

As a leader in projects, Caravel has what it takes to successfully complete your project because projects are our lifeblood. We know that successful project management is not done 'by numbers'. It is a complex and creative process that is underpinned by structured methodology, skill and experience.

Our specialists regularly deal with a multitude of portfolio, programme and project complexities - from methodology matters to people issues. They do so with much creativity and a total focus on value.

Project planning and executing utilises the four generic principles of classical management with an emphasis on leading and communicating.

PLANNING

ORGANISING

CONTROLLING

DIRECTING

LEADING AND
COMMUNICATING

Caravel's project planning and execution expertise is applied across the entire project hierarchy - project portfolios, programmes of projects and individual projects.

On each level, it encompasses the whole life cycle of the project: initiating, planning, executing and closing. Each phase is a managed process accompanied by a management decision process to determine project continuance.

Issues and processes discussed in this brochure relate to all project roles irrespective of whether the task at hand is a project portfolio, programme of projects or an individual project.

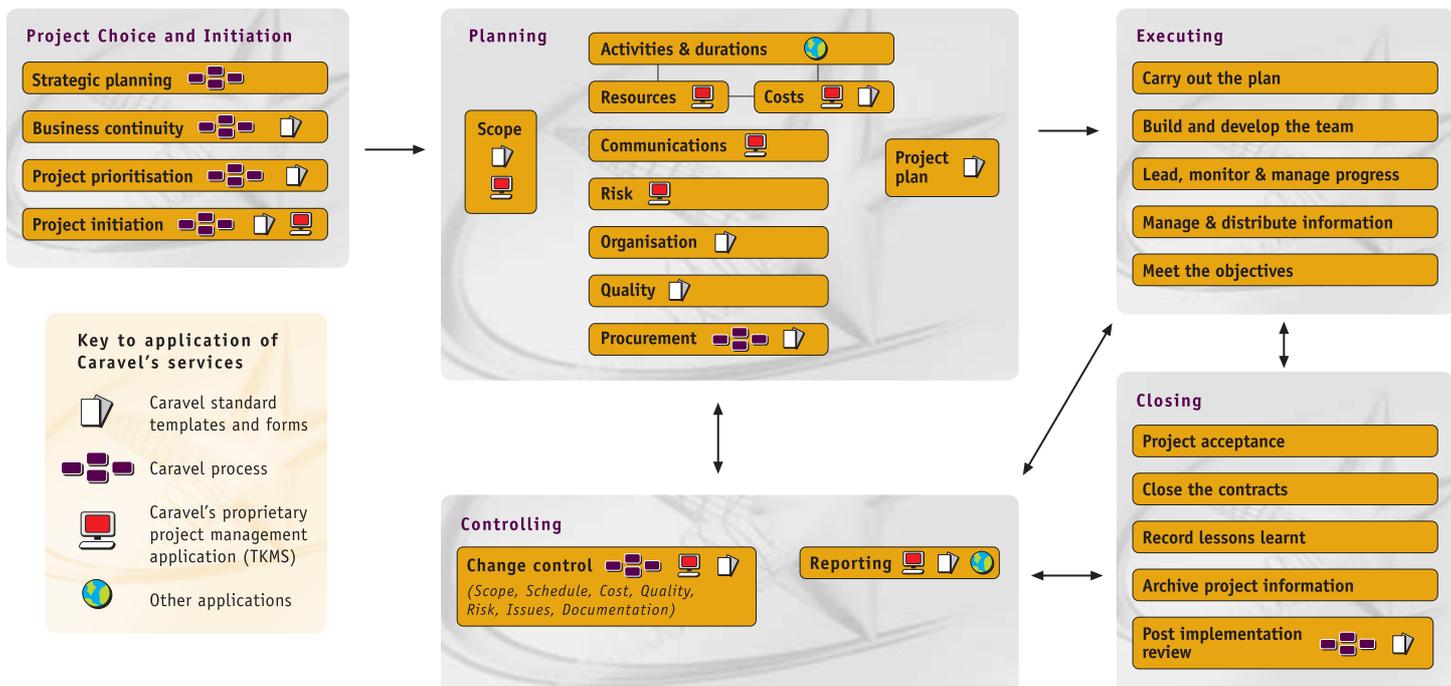
The service in practice

Caravel's project planning and execution is underpinned by a thoroughly professional approach which results in one or more of the following activities:

- provide a disciplined planning approach to a project to ensure that the project deliverables are closely linked to the strategic needs of the organisation
- develop a comprehensive project plan as the basis for efficient project execution that completes at the earliest time and at the least cost
- undertake project planning to ensure clearly defined control procedures - the best means of ensuring success in project execution
- provide continual proactive risk assessment and management throughout the project, ensuring that time, budget and quality objectives are met
- provide a Project Manager and a selection of other project roles to work with, and utilise, your own organisation's resources
- manage your projects using a disciplined and process-based approach through the execution stage to ensure that the project outcome is achieved at an optimal cost/risk trade-off
- deliver project results to your client or organisation that have been defined in the scope and agreed with the users
- close-out all administration and contract activities and documentation
- capture the learning and knowledge permanently in your organisation's memory



CARAVEL GROUP PROJECT MANAGEMENT



The plan charts the course

A well conceived project portfolio, programme or project management plan is a fundamental ingredient for success. It represents a virtual map, a how-to document, that guides the project to its successful completion.

Project planning encompasses defining and refining the scope, identifying project deliverables and resource requirements, scheduling activities and estimating costs. It also involves establishing a cost and schedule baseline, as well as developing quality, risk management, communications and procurement plans for the project.

And because effective project planning is crucial, the effort expended on it should reflect the size and complexity of the project. For a major project this goes far beyond a simple timeline. That's why Caravel's specialists regularly employ professional Project Planning methodologies such as the processes endorsed by the Project Management Institute (PMI).

PROJECT PHRASE	PRE-DEVELOPMENT AND INITIATION	PLANNING	EXECUTION	CLOSE OUT
TYPICAL PLANS AND MAJOR ACTIVITIES	<ul style="list-style-type: none">• High level scope• Feasibility studies• Project definition• Cost benefits	<ul style="list-style-type: none">• Scope• Risk• Budget• Benefits• Quality• Communications• Management plan	<ul style="list-style-type: none">• Data capture• Contract management• Specification• Design• Build• Test• Procure	<ul style="list-style-type: none">• Implementation review• Formal acceptance• Administrative and contract closure

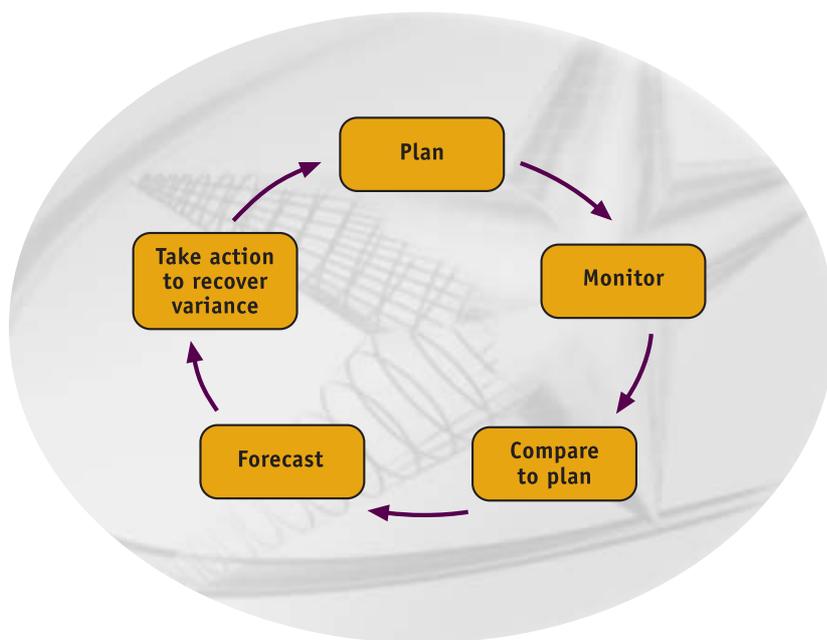
Allowing projects to go with the flow

Project execution and control has to incorporate a certain amount of flexibility as new information comes to hand, without sacrificing on the level of detail.

'Rolling wave' planning allows this while also proactively correcting for variances and mitigating risks.

Applying this planning approach, Caravel identifies variances from the baseline plan before reviewing and analysing the options and finally taking corrective action.

Throughout the execution and control phase, the following cycle is repeated:



The user requirements or preliminary design work is generally carried out during the planning phase of a project while the time consuming detailed design is usually carried out during the execution phase.

This procedure is consistent with the philosophy of rolling wave planning and allows baseline plans to be altered as issues arise during the detailed design phase.

Keeping scope under control

'Scope creep' is a well-known project enemy. Caravel knows that and understands the importance of judiciously defining and managing scope. Our specialists therefore allow just the right amount of flexibility without sacrificing control. This is essential to maintain focus, particularly for software development projects.

During the project initiation phase Caravel formulates a scope description which needs to be expanded with progressive detailing during the planning phase.

The scope document comprises a Work Breakdown Structure (WBS) and also ideally a product definition. The WBS is a hierarchically organised document in which the bottom levels describe the individual tasks that comprise activities yielding measurable results, which in turn comprise a work package culminating in a milestone.

Good scope planning reduces uncertainty and consequently risk. It forces the management team and the project manager to think ahead, confront issues in advance and resolve conflicts and uncertainties prior to the design process.

Schedule and resource planning

Establishing a realistic schedule based on the estimated duration of each task is a vital aspect of the process because it helps to

- schedule and assign resources in an optimal manner
- meet a specified end date dictated by external factors
- set a baseline which can be used to measure and control progress

Throughout the scheduling exercise, Caravel carefully considers factors that drive the schedule and the project's end date. Importantly, the process also introduces meaningful milestones which ensure that the measurement of progress is both valid and easily communicated.

Ultimately, however, project resource planning ensures that the needs of both the project and its stakeholders are met with minimum impact on other programmes of work.

Dollars and sense

The importance of budgeting is well recognised. In project terms, this requires estimates for all activities so that costs can be controlled during the execution phase of the project.

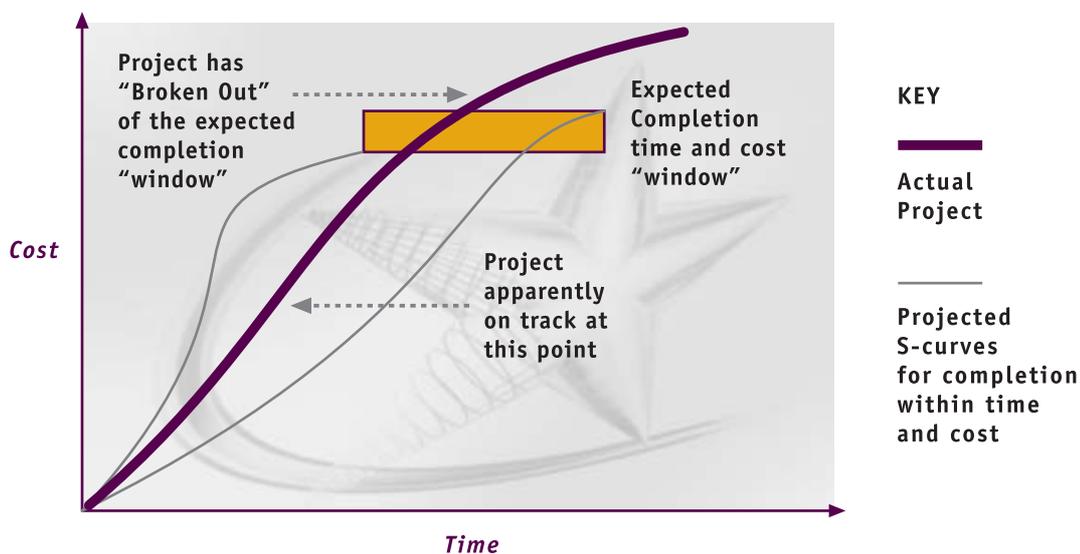
Caravel maintains two cost estimates: the approved baseline budget with separate contingencies and the regularly updated best forecast. Actual expenditure is also maintained of course. Project reporting usually includes S-curve, bar graph and tabular financial reports where forecasts and actuals can be compared with a baseline.

The project "breakout" phenomenon

Regular monitoring of project progress goes a long way to minimise project risks. Caravel uses appropriate tools to keep projects under control so they can be completed within the expected time and cost window.

The Earned Value technique determines the progress of a project in time by placing a value on the work delivered against time and comparing this with the baseline project plan. Two S-curves depict the minimum and maximum expected time and cost positions within which a project is likely to be completed.

The Earned Value analysis (schedule and cost variances) is then plotted onto the same graphs to detect whether a project that appears on track is actually headed for "breakout". This method is supported by the quantity surveying profession and commonly used for projects with 'hard' technology components such as construction projects.



Change projects, by contrast, have a significant proportion of “soft” discipline components and therefore require different techniques to minimise the likelihood of projects “breaking out” of control. To keep the project on track, Caravel draws on techniques such as the critical chain method, risk management methods or other methods that are aligned with the use of the theory of constraints, as outlined in the “Strategic Management of Projects” and “Project Assurance” brochures.

Project execution and control

The lion’s share of project resources – in terms of time, budget and effort – is expended on project execution and control.

Given the nature of projects, the phase of managing and controlling all planned project activities requires excellent motivation and leadership while also managing a range of project aspects:

- schedule
- communication and information distribution
- meetings
- progress reporting
- financial control
- quality
- scope
- change control
- risks

In addition, project execution and control requires allocating and managing project resources, and letting and managing contracts to purchase equipment and services.



The project is only as good as its people

Projects essentially revolve around people. That's why Caravel's project managers apply a disciplined approach that combines leadership, listening, negotiation and motivation. Our multi-disciplined specialists understand the importance of a motivated project team and they are selected because they have the X-factor.

In fact, our talented resource pool is the result of a process-driven approach which is underpinned by our associate program. Wholly focused on quality, this establishes very clear guidelines about Caravel projects. Recruited through advertisements and often referrals, associates are attracted to Caravel's systems, track record and client base. Our 'recruitment engine' consistently attracts top shelf talent.

People are only selected for client projects if their skills and skill level matches the project requirements. Given our extensive resource pool, we can offer our clients the luxury of a close match. We know that the quality of resources is a critical success factor for projects and we have therefore built our service delivery around this premise.

For client projects this ultimately means an unrivalled degree of certainty that Caravel can offer the right people at the right time.

Adding value with tools – the best of both worlds

With the help of Caravel's Total Knowledge Management System (TKMS), projects transcend the ordinary. Delivering smart solutions online, the system adds value for the project team through a number of beneficial functionalities:

- supports portfolio, program and project levels of management
- scope management with Project Change Request management
- schedule management
- resource allocation management
- issue and escalation management
- risk management
- budget and cost management (with costs mapped to budget and variances)
- "traffic light" reporting for individual projects, programs and portfolios of projects
- relationship management
- embedded quality management system

Caravel's TKMS Project Management Office tool kit is a complete project companion. Acting as a temporary overlay to the client enterprise management system, it eliminates a delayed start-up and supports rapid delivery benefits. In practice this means that the project team has secure and swift access to all Caravel tools via the internet – it couldn't be more convenient. Clients can retain their system independence while gaining the full benefits of a highly efficient system.

While the TKMS tool kit is applied temporarily, Caravel can implement an equivalent enterprise system if desired.

A multi-dimensional approach achieves results

While projects often share many similarities, projects are rarely identical. To meet the specific needs of your project, Caravel therefore draws from a range of methods that may include:

- selecting the right overarching approach such as Critical Chain instead of Critical Path (refer to Strategic Management of Projects brochure)
- systems engineering principles and methods
- quality management systems and TQM
- safety management systems
- detailed process orientated methods

Caravel's project execution and control services

Management

Caravel manages your projects using a disciplined and process-based approach to ensure that the project outcome is achieved at an optimal cost/risk trade-off.

Control

Exercise project control using clearly defined procedures ensuring adherence to project plans and successful implementation.

Risks

Undertake continual proactive risk assessment, management and mitigation throughout implementation ensuring that time, budget and quality objectives are met.

Contracts

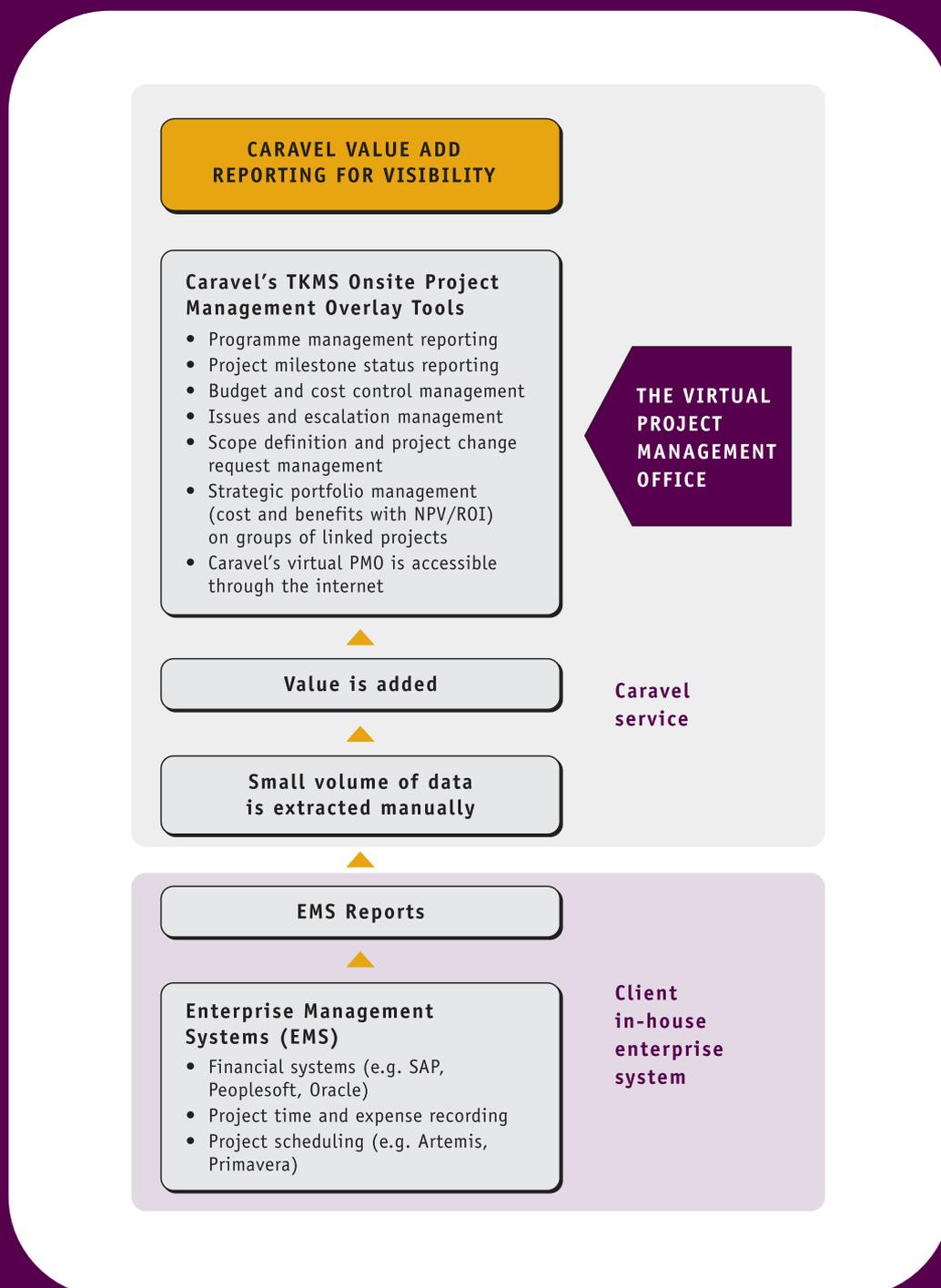
Negotiate and manage project contracts for the best commercial outcome for your business, while maintaining quality supplier/customer relationships.

The virtual Project Management Office (PMO)

Caravel's project management services are enhanced with a comprehensive solution for all levels of project management.

With total access to Caravel's full project management capability, clients immediately gain the benefit of a fully-fledged virtual project management office with all management and reporting tools at your fingertips.

The virtual project management office is ready for action - as and when needed - without having to make costly investments for systems and skills.



Caravel's role as business partner

Caravel has built a model that allows successful business partnering on a performance (risk-reward) basis with a co-sourcing basis. The aim behind this approach is to:

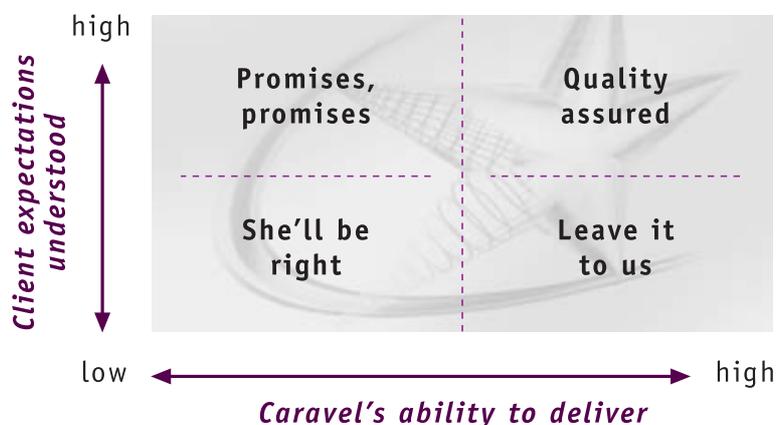
- establish an appropriate commercial structure for the client organisation
- clearly define the roles whereby the client maintains control of strategic elements (portfolio and some program management) while Caravel performs tactical elements
- engage with the client organisation through a business partnering agreement

For further information please refer to our Project Partnering brochure or request our White Paper that clearly defines existing opportunities to set up an appropriate service level agreement.

Making sure we're on track

Caravel applies a rigorous quality assurance approach to ensure that projects are on track. This formal process uses a chart to plot client expectations in context of our ability to deliver.

This approach reliably examines client perceptions against project team perceptions while measuring reality with a structured approach. By highlighting the difference between perception and reality, the project team can easily identify opportunities for improvement.



The benefits

The benefits of Caravel's project planning and execution services are evident in many project aspects:

- projects will be completed on time, within budget, and with a quality that meets client expectations
- clients and stakeholders will be satisfied
- the project will support your organisation's strategic objectives resulting in greater profitability
- projects will be undertaken more effectively with less crisis management by professional project managers who bring management experience and expertise to project execution and control
- control methodologies and progress reporting templates can be reused to save time and money on all future projects
- contracts will be managed to achieve win-win outcomes for suppliers and customers

Caravel has a wealth of experience and understands project implementation. Our strong track record across the full spectrum of project execution and control speaks for itself.



Caravel's range of project services

As a leader in projects, Caravel offers a range of specialised consultative and implementation services that span the entire life cycle of a project from inception, through implementation to final hand-over. Caravel adds value at every point along the way through project management services for:

Strategic Management of Projects

Core services include:

- Multi-project management
- Organisational Resource Management
- Value Management
- Project Feasibility Studies
- Critical Chain Modelling
- Organisational Project Management Maturity Assessment

Project Assurance

Core services include:

- Project Governance
- Project Audits
- Project Health Checks
- Project Performance Management
- Recovering Troubled Projects
- Project Risk Assessments
- Post-implementation Review
- Mentoring and Training

Project Planning and Execution

Change Implementation

Business Process Innovation

Business Partnering

Enterprise Management Solutions

Mission Critical Moves

Customer Contact Centres

Service Management Centres

Operational Control Centres

Safety Critical Projects

Dealing Rooms

Bid and Tender Management

Caravel can tailor a range of industry-specific services to suit the exact needs of your organisation.

Please refer to our website for your nearest
Caravel office: www.caravelgroup.com



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