PSA committee
PROJECT MGMT

presents

BEST PRACTICES
Roundtable Highlights
from sessions conducted at TEC 2015

The PSA Project Management Committee hosted a Best Practices in Project Management Roundtable to help you navigate common challenges in the Project Life Cycle. Read below for processes you can implement to improve your project outcomes.

1 Initiation

PHASE: The beginning of a project, the initiation phase focuses on the preliminary project requirements with the development of the project team and clarification of the project specifications.

CHALLENGES: Roundtable attendees reported turnover from sales and statement of work communication as the most challenging aspects of the initiation phase.

BEST PRACTICES:

Develop a formalized, written process for handoffs from your sales to operations teams. Requiring documentation increases individual accountability while addressing items that may otherwise have been missed by the sales team, such as discussions with the customer on preferred payment terms. This also creates a more consistent and efficient process.

Kick-off meetings are vital to every project. However, it is just as important to hold weekly meetings inclusive of your project managers, operations and sales teams to review all projects, current and upcoming. Within these meetings, provide the opportunity for:

Help your Sales teams better understand project requirements - invite them to walk the site with the Technician.

- Operations to report resource allocations so the sales team is cognizant of any backlog delays when negotiating contacts and start dates with customers.

- Project managers to re-engineer a project as a means to flag and identify any project issues.

- Cohesive team development. For example, assign a project manager to work specifically with certain sales reps and engineers on a regular basis.

- Operations to alert the sales team to opportunities for additional sales to existing customers.

Finally, provide commission based incentives for your project managers and sales teams based on project deliverables.

2 Planning

PHASE: In this phase, the team is building the project foundation by detailing project scope and costs, developing a communication plan, refining design drawings, and defining milestone schedules and payment requirements to meet the project deliverables.

CHALLENGES: The top challenges discussed at the roundtable included scheduling, resource allocation, and the availability of qualified, experienced technicians.

BEST PRACTICES:

Detailed scopes are at the heart of every project and the more details, the less room there is for misinterpretation. Project managers should work with sales representatives in building and managing customer expectations before the onset of the project. Support this process by offering formalized checklists to capture key project information clearly and concisely.

Proper resource forecasting ensures that operations teams are able to provide the properly skilled (trained and/or certified) technicians within the correct timeframes across multiple concurrent projects. Maintaining this forecast and keeping it available to all operations and sales teams provides the information needed to better manage the customer's schedule expectations.

The ever-increasing demand for qualified security technicians and the shortage of available talent is a hardship felt by many project managers tasked with gathering competent teams. All the more reason to develop your potential and current talent pool with apprenticeship programs. Project managers can play an important role in guiding the education and career paths for technicians. In many PSA owner companies, technicians are often promoted to project managers. Many lead technicians fulfill project management tasks at the field level and benefit from the development of those skills in addition to the ongoing technical education that is required to remain competitive in today's market.

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Execution

PHASE: Executing the plan requires the most time and resources of any phase of the project life cycle. As plans are turned into action, special attention is given to processes and procedures such as communication management, stakeholder engagement, change order management, and subcontractor relations.

CHALLENGES: Safety plans, material procurement, and resource allocation were troublesome areas for project managers in the roundtable.

BEST PRACTICES:

Safety Plans — Obtaining site-specific safety documentation can be a challenge in and of itself. Defining the safety requirements at the site allows your team to understand what protocols are required. Once defined, repetitive education and promotion of these practices is key. Below are a few tips for protecting your human capital:

- Designate a safety officer and have the individual lead safety meetings.
- Review safety plans quarterly with all technicians and project managers.
- Regularly include safety training reminders within your meetings, such as wearing personal protective equipment and following ladder safety tips.
- Provide safety videos with quizzes to increase attendance and knowledge retention.

Material Procurement & Storage — Missing parts can throw a wrench into your plans and add dollars to the budget. Try limiting access to inventory, such as a cage or crate, and requiring technicians to count parts prior to taking kitted jobs from the warehouse. For added accountability, mandate that technicians are responsible for monitoring their own inventory and accounting for any shortages.

Project Meetings — Project managers often need more information that originally communicated by the sales team. Prior to the initial scope of work verification, review the project in detail with the sales team and be prepared with questions for the customer. Confirm that the end-user expectations match owner scope of work expectations for the system use.

Resource Allocation — Project schedules often change and the more in-sync you are with other contactors and end-users, the better you can plan your manpower. Schedule weekly operations meetings well in advance (2-3 weeks out) between all project managers within your organization to discuss staffing requirements. This will allow you to borrow or loan manpower depending on project deadlines. Without appropriate communication, resources may not be utilized to their full potential.

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Monitoring & Control

PHASE: As the project progresses, performance is continually monitored against time, budget, and scope specifications. Changes are inevitable, but with regular assessments, deviations from specifications can be mitigated through corrective actions.

CHALLENGES: Risk response and quality assurance were top of mind for roundtable participants.

BEST PRACTICES:

Project risks can run the gamut — construction delays, liquidated damages on a late delivery, product or software failures, union labor issues, delays from the client's IT department — no matter the reason, it is the project manager's responsibility to be prepared.

The key to managing risk is a clear project plan. Due to hectic schedules and heavy workloads, you may have the tendency to rush through the planning process on a project in order to get work started right away. It is important to not only identify key milestones in your project, but also to understand what happens if something prevents those milestones from being achieved as planned. Using project management "critical path" methodology, you can quickly identify those milestones and establish contingency plans to manage the risk for your project. Once contingency plans are set in motion, document the risk response with frequent, clear communication with all internal and external stakeholders.
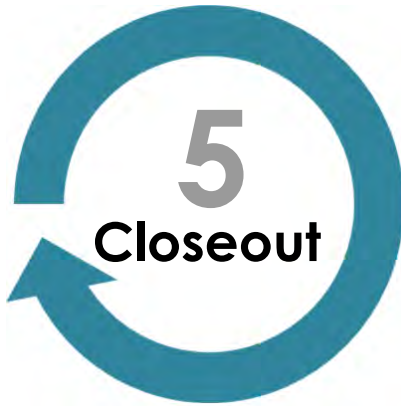
Even when managing risks, the Project Managers must ensure the quality of the project is not compromised. A process based approach, quality assurance incorporates quality control to verify, monitor, and test that project deliverables and installations are in accordance to the specification.

Effective project commissioning and testing requires thorough project documentation practices, such as the collection and availability of drawings, equipment information lists, loading schedules, daily logs, a copy of the quote, IP addresses, punch lists, etc. Project photos, in particular, can be taken and used for many reasons, including:
- Documenting how your company performed.
- Assisting your service departments.
- Training employees on quality expectations for all projects.
- Developing marketing and sales collateral.

Quality assurance is not just "expecting," it is "inspecting." Whenever possible, make sure you visit the site to inspect the work performed and speak with your customer after project completion to verify the solution has met their expectations. If you cannot visit the site due to geographical or time constraints, be sure to thoroughly review the project documentation from the field to verify quality prior to closing the project.

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5 Closeout

PHASE: The last part of the project life cycle, and perhaps the hardest part of the project, the closeout phase accesses and finalizes all project tasks for completion. Areas for improvement are documented to develop internal best practices for future projects.

CHALLENGES: Roundtable attendees listed external trade delays, warranty closeout documentation, and obtaining lessons learned as their primary challenges within the closeout phase.

BEST PRACTICES:

Delays from other trades can hinder project progress, but there are several strategies project managers can employ to maintain project schedules and timely deliverables:

- Build rapport and develop relationships with trade partners that are causing the most issues.
- Review your contract requirements on a regular basis for any issues.
- Include the trade partner deliverables in the project schedule with firm required delivery dates. Inform the General Contractor of the monetary ramifications if these dates are not met.
- Request necessary information upfront and set specific submission dates to ensure that the data will be available when needed.

As the project comes to an end, it is imperative that all team members discuss lessons learned, deficiencies, and challenges. This information can improve current processes and future project results. Understandably, companies may not have time to conduct these meetings on every project. Start by reviewing projects with five percent variance in profit margins. Do not wait until the end of the project to document problems. Instead, have teams continually track these learning experiences by:

Lessons Learned
recognize mistakes
observe what works
document them
share them

- Requiring technicians to keep daily logs with names and dates (can also be used as a legal document if necessary).
- Re-estimating the hours required for completion for all disciplines to reset the expectations and schedules.
- Regularly reviewing the RFP for any items that may have been missed.
- Providing reports to the entire team on the estimated time for completing tasks so they can report back on actual completion times.
- Instruct installers to report directly to the Project Manager.

Warranty documents and client training are a large component to this project phase. Remember, beneficial use warranty letters should start at the time of system beneficial use, not completion, and the operational warranty clock should begin. Always obtain sign-off for all client training and leverage manufacturers for assistance with training options and resource documentation.

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