

Customised Project Management and Microsoft Project training

People throughout the world have heard of Magna Carta. It's been called 'the foundation of democracy' and if you ever wanted to understand why, or if you wanted to marvel over the Lindisfarne Gospels or Gutenberg Bible, then the British Library should be top on your list of places to visit – whether at its splendid headquarters at St. Pancras in London, or online at www.bl.uk

BRITISH
LIBRARY

Background

The British Library is the national library of the United Kingdom and one of the world's greatest and most treasured libraries. It welcomes everyone doing research, whether for academic, personal or commercial purposes and its collections cover every field, so it's strong on current scientific and business topics as it is on social sciences and the humanities. It contains 150 million items, including books, manuscripts, maps, newspapers, patents, magazines, music scores, sound recordings, photographs and stamps.

As a 'copyright library' it's entitled to a copy of everything published in the UK – an entitlement that dates back to 1662. This right of legal deposit is now being extended to cover digitally published items and websites too.

Given the major changes in publishing and information services, it's clear the Library has to undertake numerous development projects to support both internal and external services. The Library's projects can range from small-scale ventures such as the digitisation of a particular set of material, to large-scale business changes such as the introduction of a new system for one of its core business processes; a web-based searching across its historically separate catalogues, for example.



case study

project solutions that make a difference

Establishing the need

Some of the very largest projects, such as constructing and equipping a new storage building with controlled atmospheric conditions to protect around 100km of traditional printed material, will span more than one year in duration, affect many Library departments, produce new strategic risks and opportunities, attract a high public profile and involve a budget of several £ million. This scale of investment is managed as a Programme.

Typically, the Library will expect around a hundred projects of various sizes during the course of a financial year, with perhaps three or four larger Programmes running at any one time. Furthermore, many of the projects are undertaken through external partnerships, or with outsourced specialist skills, or with special funding – which heightens the need for really effective management, based on a clear understanding of roles and responsibilities, an environment of empowerment and timely decision making.

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To develop and promote best practice in projects and programmes, the Library set up a Corporate Programme Office (CPO) to offer guidance to all its Project Managers and to devise a clear approval process to enable a new project to enter into the Corporate Portfolio for visibility to the senior management team. The CPO's role was also to develop an education and training programme to support the project community.

As part of this identified need, the CPO began to approach a number of training providers to satisfy this need.

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The technical requirement

The Library was looking to source an integrated training package comprising both project management techniques and practical use of the Microsoft Project tool.



Project Management Techniques Training

The Library wanted to offer project teams a firm foundation in the principles and best practice of project management – based on the government-endorsed methodology PRINCE2 (PROjects IN Controlled Environments).

This training event had to allow for some tailoring to suit all sizes of projects. The Library wanted to realise maximum benefit from familiarity with a standard approach, but without being constrained to a one size fits all adherence to method. This was not to be a PRINCE2 training event in itself.

Microsoft Project Training

The chosen project management tool was Microsoft Project.

This requirement was to deliver a training event which would teach the simple, best practices in using Microsoft Project to effectively plan and manage projects to schedule and be able to utilise project resources effectively.

It was also recognised the importance of having pragmatic links between the two training events whereby, for example, the best practice technique of product based planning, which was to be introduced within the Project Management Techniques training, would also be incorporated into the Microsoft Project training to illustrate how project management techniques could be supported effectively with effective planning tool use.

The CPO provided guidance and in-house material to assist in slotting this planning approach seamlessly into the standard course material. Furthermore, they provided examples to illustrate how this training could be pragmatically applied to real British Library projects.

Finding the training partner

Back in March 2004, the Library invited a number of training companies, Project Learning among them, to tender to deliver the Project Management Techniques and Microsoft Project training as a single contract. Project Learning was duly successful in being awarded the training contract. At this point, the CPO became the formal sponsor for the training programme, working in close partnership with Project Learning.

Following initial discussions with Alasdair Bruce and Philip Beresford of the Library's CPO, Andy Jessop, Managing Director of Project Learning put forward a proposal recommending the following, to address the stated training requirement:

- A customised two day Project Management Practicalities training event
A highly customised version of Project Learning's standard three day Project Management Practicalities training event, tailored closely in conjunction with the Library's CPO to reflect both in content and delivery the principles and best practice of project management to the project teams.
- A standard two day Microsoft Project Essentials training event
A standard Microsoft Project Essentials training event, but a tailored delivery style to refer and map back to the Project Management processes and techniques such as the product based planning approach introduced within the Project Management Practicalities training event.

The two customised training programmes would utilise the same case study to enable delegates to benefit from a familiar theme to achieve consistency and cohesion throughout course delivery.

Philip Beresford, Project Consultant within the Library's CPO: "We were very impressed by the proactive approach Project Learning took to building a course programme with us that met our needs, incorporating some of our own particular preferences for a tailored implementation of PRINCE – and of course the degree of coupling we were able to achieve between theory and practice with the software tool."



Appointed tutor

Diane Gosling, Director of Project Learning and a fully registered PRINCE2 Practitioner was the most appropriate consultant, mainly due to background and experience to undertake all course development and delivery for future work and provide a single point of contact for the Library.

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Course customisation

It was quickly confirmed from early discussions that the PM Principles programme should be a 2-day customised version of Project Learning's 3-day Project Management Practicalities training event. It was all agreed that marketing a 2-day training event would be easier to sell internally to prospective delegates, than a 3-day training event, due to diary and work pressures.

The course outline was built up of modules to aid prioritisation of the most valuable content and teaching messages for the targeted audience.

Project Learning was happy to provide full course manuals with a 'grey wash' over the material not to be covered, which worked very well. This approach allowed it to be made very clear to the delegate what sections of the reference notes were not to be delivered, but nevertheless allowed the full reference notes to be read at a later date, if so desired. This idea was also carried through to all MS-PowerPoint presentation slides, delegate exercise handouts and case study notes, to provide consistency and cohesion to the overall training delivery.

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"To meet the challenges of the British Library's demanding strategic agenda we need capable project managers. Project Learning have become our valued partners in helping develop our managers so they have the skills needed to deliver their key projects successfully. During the time the Library has worked with Project Learning I have been consistently pleased with the high level of positive feedback from course delegates for the customised project management principles and MS Project courses Project Learning has developed and delivered for us"

Course delivery

Once the course customisation was completed and signed off by both parties, the first tailored two-day Project Management Practicalities training event was conducted at the Library's Yorkshire site in July 2004. The training event was very well received with constructive feedback captured, to allow necessary minor adjustments to be made both to the course material and delivery for the next scheduled training event.

Since the initial training event being conducted back in July 2004, Project Learning Limited has delivered a total 8 Project Management Practicalities and 10 Microsoft Project training events to date.

Alasdair Bruce, Head of CPO: "To meet the challenges of the British Library's demanding strategic agenda we need capable project managers. Project Learning have become our valued partners in helping develop our managers so they have the skills needed to deliver their key projects successfully. During the time the Library has worked with Project Learning I have been consistently pleased with the high level of positive feedback from course delegates for the customised project management principles and MS Project courses Project Learning has developed and delivered for us."



Lessons learned

What has made this particular contract of work so successful and enjoyable, has been the relationship between customer and supplier being very much one of a *partnership*.

During course customisation and delivery, there was continual dialogue, which encompassed regular reviews and continual feedback from the training events being delivered, to ensure the training was meeting the stated requirements, with expectations and benefits being realised for the project teams. Any minor adjustments necessary following delivery were acted upon quickly to either course material or delivery style. This action was as a direct response from ongoing delegate feedback being captured to ensure continual improvement of the training programme being offered to the project teams.

As part of this process, each delegate was required to complete a feedback form which translated into marks, which in turn was then inputted into an MS-Excel spreadsheet for continual, up-to-date analysis. This enabled the CPO to monitor quality, relevance, applicability and success of the training events and to evaluate whether any minor adjustments were necessary at any point in time.

As part of general feedback received from the Library, it was commented by one CPO member that marks captured from the ongoing delegate response for both the Project Management and Microsoft Project training events had been the highest ever received.

Philip Beresford, Project Consultant within the Library's CPO: "Our thanks to Diane in particular – she has great patience, clear delivery, good time management, a deep knowledge of Project, and always scored well on delegate feedback forms - one of the highest rated trainers we have had."

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