Advanced Project Management - FUSION METHOD XYZ

A project methodology systems approach for the project sponsor to implement corporate strategy

Rory Burke
Project Management Series
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Case Studies: Numerous case studies are embedded in most chapters to highlight the application of the project methodology systems approach in various situations.
Abbreviations

*Advanced Project Management* includes the following abbreviations:

- **ABS** – American Bureau of Standards
- **APM BoK** – Association of Project Managers
  Body of Knowledge
- **BoK** – Body of Knowledge
- **BOOT** - Build Own Operate Transfer
- **BOT** – Build Operate Transfer
- **BS** – British Standard
- **CEO** – Chief Executive Officer
- **CND** – Campaign for Nuclear Disarmament
- **CSF** – Critical Success Factor
- **DCF** – Discounted Cash Flow
- **DIN** – Deutsches Institut für Normung
- **EV** – Earned Value
- **HRM** – Human Resource Management
- **ICB** – IPMA Competence Baseline
- **IPMA** – International Project Management Association
- **ISO** – International Organization for Standardization
- **MTBF** – Mean Time Between Failures
- **NCR** – Non Conformance Report
- **OBS** – Organization Breakdown Structure
- **PC** – Personal computer
- **PDU** - Profession Development Units
- **PEST** - Political, Economic, Social, and Technological
- **PESTEL** - Political, Economic, Social, Technological, Environmental and Legal
- **PBS** - Product Breakdown Structure
- **PID** - Project Initiation Document
- **PFI** - Private Finance Initiative
- **PMBOK** – Project Management Body of Knowledge
- **PM** – Project Manager
- **PMI** – Project Management International
- **PMMM** – Project Management Maturity Model
- **PMO** – Project Management Office
- **PMP** – Project Management Plan
- **PO** – Project Office
- **PPP** - Public Private Partnership
- **PRINCE2** - PRojects IN Controlled Environments (second edition)
- **PS** – Project Sponsor
- **QA** – Quality Assurance
- **QC** – Quality Control
- **R&D** – Research and Development
- **ROI** – Return on Investment
- **ROT** – Refurbish, Operate and Transfer
- **RSI** - Repetitive Strain Injury
- **SLEPT** - Social, Legal, Economic, Political and Technological
- **SOW** – Scope of Work
- **STEER** - Socio-cultural, Technological, Economic, Ecological, and Regulatory
- **SWOT** - Strengths, Weaknesses, Opportunities and Threats
- **TBL** - Triple Bottom Line
- **TQM** – Total Quality Management
- **WBS** – Work Breakdown Structure
- **UNESCO** – United Nations Educational, Scientific and Cultural Organization
- **USA NCB** – USA National Competence Baseline
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Project Management has been one of the major growth areas of the past half-century. For many, it is an informal discipline, one that lacks the rigour of academia, but flourishing in the practitioner world. While that is only a partial view and there is considerable academic interest in the subject, there can be little doubt that project management and its related fields of programme and portfolio management are seen as not just popular topics but essential ones in the world of business.

This popularity is demonstrated by the enormous number of books devoted to projects and their management. Most of these offer a routine overview of basic planning and control techniques and are rooted in the delivery side of project management. Such books are aimed at the practitioner, the people who execute projects that have been defined or approved for them.

There are few books available that deal with the more strategic aspects of project management and fewer still that offer useful advice to the senior manager who is entrusted with the task of selecting and approving those projects, often business critical but always important in the success of the enterprise. This book is one of the very rare examples where the role of senior management is laid out for the reader.

Now that delivery of business benefit is so frequently achieved through projects, it becomes clear that projects are not just about achieving the planned outcomes, important though these are. Business cases need to be integrated across the firm, resource utilisation must be optimised so that the most efficient employment of resources is achieved, and the portfolio of projects must be matched to the needs of the firm. These are strategic matters and are the responsibility of the senior management, usually at board level.

Research by leading project management associations has shown that the role of senior management in dealing with these matters is not well understood, mainly because projects are seen as tactical matters and thus outside the scope of senior management. For some companies, the transfer of strategic responsibilities to project managers has met with mixed success. The project manager is primarily concerned with the delivery aspects of the project and has little capacity available to devote to these more strategic functions, yet these functions are crucial to the firm. Who should handle these difficult strategic issues is a key decision for most companies and one they cannot afford to get wrong.
Readers of this book will find that at its heart is the recognition that the role of senior management is critical to the effective delivery of projects that realize benefits to the company. Further, responsibility for company-wide project delivery is allocated to an individual, known as the Project Sponsor. Conceptually, this is not a new idea and has been embedded in methodologies such as PRINCE2® for many years. Even though the concept is well known, it seems that its implementation is either poor or non-existent.

Perhaps more significant, there is little guidance for Project Sponsors yet the function is critical since the role provides the link between corporate strategy and its implementation. This book addresses this issue by showing how a project management methodology at the company level may be used to ensure that project execution is optimised in relation to corporate goals.

Outside the construction industry it seems that few project managers break through into senior corporate positions. This is an aspect that has troubled Project Management Associations for many years and one they have so far failed to overcome. Perhaps Advanced Project Management will provide some answers by showing that the discipline covers far more than project execution and control techniques.

Miles Shepherd
Salisbury, England

BSc (Hons), FAPM (Hon), MBCS, CITP, Chartered MCIPD, IPMA D
Chair of ISO Technical Committee 258 (Project, Programme and Portfolio Management)
Chair of ISO Project Committee PC236 to develop ISO 21500 Guidelines for Project Management
When I wrote my first Project Management book in 1989 one book, which focused on tools and techniques, was deemed to be sufficient to support most project management courses. But since then, project management education has expanded to encompass a wide range of skills, knowledge and organizational levels which now demand a library of books.

To address the different organizational levels of project management I have focused on three distinct levels:

- Project team members new to project management who need tools and techniques (see Burke, R., *Fundamentals of Project Management*).
- Project managers (experienced) who need planning and control skills, and leadership skills (see Burke, R., *Project Management Techniques*, and Barron, S. and Burke, R., *Project Management Leadership*).
- Project sponsors (representing the client) who need project methodology skills to develop and implement corporate strategy (this book).

Most project management books look at project management from the project manager’s perspective. In this book I want to consider the change process from the client's perspective. So instead of asking, ‘Is the project satisfying the corporate needs?’ the question should be, ‘What change, strategy or project should be implemented to satisfy the corporate objectives?’ By asking this question it means that we are looking forward from the client’s perspective rather than retrospectively from the contractor’s perspective.

Looking at projects from the client’s (project sponsor’s) perspective is a rational approach because all projects are owned by a client. This means all projects are internal projects for the client organization. Therefore, the role of the project sponsor is pivotal to ensure the project develops and implements corporate strategy successfully and ultimately realizes benefits for the client company.

While researching material for this book I found that it was generally felt that the project sponsor pays for the project, but there was uncertainty about what other functions or roles the project sponsor was responsible for. I felt this should be a concern because it is widely accepted in the bodies of knowledge (PMBOK 4ed, APM BoK 5ed, IPMA ICB v3 and USA NCB v2) that the project sponsor owns the business case and, therefore, arguably owns the project; this clearly showed a lack of understanding of this important position - something this book will address.
In this book I present the case for the project sponsor to use a structured methodology systems approach to develop and implement corporate strategy. Business research has shown that corporate success depends on a company’s ability to maintain competitive advantage and, to this end, this book will show that an integrated project methodology will interlink the strategy phases with the project phases and operation phases. Failure to interlink these phases will self-limit the corporate strategy.

*Advanced Project Management* explains how to use a unique project methodology systems approach called the *Fusion Method XYZ©* that uses a special arrangement of the widely accepted project management techniques to subdivide the project lifecycle into a number of sequential phases, and then uses the project management process to manage each phase. By structuring the project management phases this way the change management process interlinks the processes within each phase and between each phase and, therefore, provides a platform for the project sponsor to develop and implement corporate strategy.

**Who Should Read this Book:** This book is designed for project sponsors, project managers and portfolio managers. It supports short executive education courses, under graduate and master level project management programmes, and MBA programmes that focus on the management of corporate strategy.

**Acknowledgements:** I particularly wish to thank Steve Barron my co-author (*Project Management Leadership*) for spending many hours discussing the finer points of project methodology, and to Miles Shepherd for writing an inspirational foreword.

For the production of the book I wish to thank Sandra Burke and Jan Hamon for proof reading, Michael Glasswell for the sketches, and Simon Larkin for the cover design.

**Rory Burke**  
*Project Sponsor*
The purpose of this book is to explain how to develop a project methodology systems approach for the project sponsor to develop and implement corporate strategy.

Business research has shown that corporate success depends on a company’s ability to maintain competitive advantage in its market and, to this end, this book will explain how a project methodology systems approach can be used to identify what changes are required and how to develop and implement them effectively.

Advanced Project Management will present the **project sponsor** as the key person responsible for managing the corporate change process to realize benefits for the company.
1. How to Use This Book

*Advanced Project Management* is subdivided into three parts for ease of presentation and understanding.

**Part 1:** The first part introduces the project management techniques that form the building blocks of a project methodology:

- **Phases** - Project lifecycle
- **Processes** - Project management process
- **Plans** - Project plans
- **People** – Project organization structures
- **Fundamentals** of a project methodology.

**Part 2:** The second part introduces a unique project methodology called the *Fusion Method XYZ®* and shows how the project methodology subdivides the project into ten interlinked phases. The purpose and content of these phases will be discussed and explained:

- *Fusion Method XYZ®* - project methodology structure
- Corporate charter phase (vision, mission and values statements)
- Corporate needs and opportunities phase (statement of requirements)
- Corporate strategy phase (business case)
- Project feasibility study phase
- Project definition phase (project design, project plan)
- Project execution phase
- Project commissioning and handover phase
- Operational start-up phase
- Project upgrade phase
- Project decommission and disposal phase.

**Part 3:** The third part of the book introduces a number of the key subject areas, and shows how the project methodology systems approach interlinks them like a thread through the phases to achieve the corporate objectives. These include:

- Stakeholders’ analysis
- Project charter
- Go/no-go decision-making
- Project finance
- Project closeout report.
2. The 4Ps of a Project Methodology

The project management techniques that form the building blocks of a project methodology are presented here as the 4Ps:

**Phases:** The *Project Lifecycle* explains how the project timeline can be subdivided into a number of phases, and how the level of effort, level of influence and costs vary over the project’s lifecycle.

**Processes:** The *Project Management Process* explains how the project phases can be subdivided into a number of management process groups to initiate, plan, execute and close the phase.

**Plans:** The *Project Plan* explains how the project management processes can be subdivided into a number of individual plans that combine to form the baseline plan, which is used to plan and control the project’s performance.

**People:** The *Project Organization Structure* explains how the leadership and management of the project personnel, and other interested stakeholders can be subdivided into the project organization structure, lines of communication, responsibilities and authorities.

![Figure 1.1: 4Ps of Project Management](image)

The first part of the book includes a chapter on each of the above techniques to outline the basic concepts of each technique. It is important that the project sponsor has a working knowledge of these techniques as they will be expanded later in this book and form the basic structure and building blocks of a project methodology.
3. What is a Project Methodology?

In its simplest form, a methodology is a means of getting from A to B. It is the process, the plan or sequence of steps required to achieve a predefined objective.

![Figure 1.2: Methodology – shows a means of getting from A to B](image)

In its broadest sense, methodologies are commonly used to carry out everyday activities from making a cup of tea to servicing a car but, for the purpose of this book, these are too trivial to be meaningful examples. A better example would be a science researcher who uses a research methodology to conduct a laboratory experiment.

> 'I can see the micro methodology.'

For the management of large corporations and complex projects the need for an integrated methodology to develop and implement corporate strategy becomes more pressing because, without it, the change management process could become self-limiting.

In the corporate context, this book will outline how a project methodology offers a systems approach that can be used to manage the development and implementation of corporate strategy (see Fundamentals of a Project Methodology chapter for a discussion on the systems approach).

A key feature of an integrated project methodology is that it ensures that within a company the strategy makers talk to the strategy implementers.
4. Fusion Method XYZ©

This book will develop a unique project methodology called the Fusion Method XYZ© which aims to provide an effective change management methodology using a special arrangement of the widely accepted project management techniques.

**Figure 1.3: Project Methodology Structure** – shows graphically how the project’s phases, processes, plans and people are integrated

Figure 1.3 shows how the Fusion Method XYZ© subdivides the project lifecycle into ten sequential phases that focus on the corporate strategy phases, the project phases and the operation phases. The project methodology then subdivides each phase into the four project management processes (initiation, planning, execution and closing).

At the next level each process is subdivided into a number of plans that align with the knowledge areas of the body of knowledge (time, cost, quality, etc.).
The final level integrates the project organization structure which is shown as a boundary encircling the project's phases, processes and plans. The project organization structure includes the roles and duties of the people internal and external to the company together with their responsibilities and authority to make decisions about using company resources.
5. Need for a Project Methodology

In our exciting and rapidly changing world successful organizations need to constantly develop and implement new strategies to update their products and services to:

- Maintain their competitive advantage
- Comply with new rules and regulations
- Respond to their customers’ needs and expectations.

To illustrate the need for a company-wide project methodology to develop and implement corporate strategy, the following four examples will outline the failure associated with:

- Weak vision
- Failed execution
- Failed business case
- Failed implementation.

The rationale is that all of the above weaknesses could have been mitigated if the companies had used a fully integrated corporate methodology.

**Weak Vision:** A weak vision implies a company with a lack of direction that is not able to respond to changes in its market. This happened to two blue chip companies; big blue IBM (in the 1990s), a computer and business software company, and the mighty General Motors (in the 2000s), a car manufacturing company. They both had ‘near death’ experiences because they were both too slow in developing and implementing new corporate strategies to respond to new technology and increasing competition until, eventually, it was too late and they became obsolete dinosaurs in a market they once led. However, since then IBM has successfully refocused its corporate strategy and General Motors, since its bankruptcy, has returned a trading profit.

*Photo: Courtesy of GM® Press Images - showing a car production line*
**Failed Execution:** A failed execution implies a company that is not able to produce its products efficiently and effectively. There are examples of companies that, even though they successfully developed innovative corporate strategies, failed to implement them effectively. Both HP (Hewlett-Packard in the noughties), a computer hardware company, and Apple (in the 1980s), a computer hardware and software company, spectacularly fell from grace because they failed to realize the benefits of their innovative vision.

Michael Spindler (Apple's CEO at the time) oversaw the introduction of the Power Macintosh line in 1994, an episode in Apple's history that is reported to typify the perception that the company had the right products but not the right people to deliver the products to the market. Power Macintosh computers were highly sought after, but Apple grossly underestimated demand for the Power Macintosh. By 1995, Apple had $1 billion worth of unfilled orders, and investors took flight.

After Spindler’s much-publicized mistake of 1995, Apple’s directors handed the leadership reins to Gil Amelio. Gil Amelio is reported to have continued Apple’s mismanagement by cutting Apple's payroll by a third and slashing operating costs, but drew a hail of criticism for his compensation package and his inability to relate to Apple's unique corporate culture. Apple's financial losses, meanwhile, mounted, reaching $816 million in 1996 and a staggering $1 billion in 1997. The company’s stock, which had traded at more than $70 per share, fell to $14 per share, and its market share fell from 16% to 4%. Fortune magazine referred to Apple as ‘Silicon Valley's paragon of dysfunctional management’.

Fortune magazine’s comment, in the context of this book, implies that Apple was lacking an integrated corporate methodology to effectively implement its corporate strategy so that it could realize the benefits.

*In step with the market.*
Failed Business Case: A failed business case implies a company that sticks to the original plan even though the market need has changed. This situation relates to companies that establish a clear vision and innovative business case but, in the process of executing the business case, the market changes and they fail to respond, leaving them with an obsolete project even before the project has finished.

For example, in 1987 three Motorola engineers had the vision that there could be a need for a satellite phone system offering worldwide coverage. The business case was to set up the Iridium satellite telecommunication system that consisted of 66 satellites in an array of earth orbits.

This pioneering project is acknowledged as being well managed, well executed, and achieved all its technical objectives. Like many other high tech international projects, Iridium took many years to attract a syndicate of investors, obtain all the necessary patents and communication licences, and develop and test the communication systems.

During Iridium’s long development and implementation period the competition developed a much cheaper, more convenient and cost-effective cellular network. Consequently, Iridium lost its potential customer base.

This case study is a good example of a well-managed project that unfortunately lost touch with the competition until it was too late. The introduction of cellular communication effectively killed the financial basis of Iridium's business case; it achieved its project and technical objectives but failed commercially. This put enormous financial pressure on the syndicate and Iridium was eventually pushed into bankruptcy.

The company has since re-emerged with a new business case that focuses on a smaller client base that operates outside the normal cellular coverage; these include the military, the offshore industry, companies operating in remote areas, and even ocean-going bluewater cruisers.

This case study highlights the project sponsor’s dilemma; as the development of the project progresses, if the project sponsor becomes aware of the competition developing a more commercial project should the plug be pulled or should the project continue? In this case Iridium continued until the inevitable happened and it went bankrupt.
Failed Implementation: A failed implementation implies a company that develops a clear vision, needs analysis and business case, but fails to implement the project effectively into the market.

This situation happened to Heathrow Terminal 5 in 2008 when the BAA (British Airports Authority) used the big bang approach to open the new terminal. For the first few weeks passengers were significantly inconvenienced as they waited for days for their flights and then, as they departed, their bags stayed in London (see case study in Operation Start-Up chapter).

The above examples of project and corporate failure, and the statistic that less than half of America's top 500 companies will be around in 20 years time, reinforces the need for an integrated project methodology to develop and implement corporate strategy. It is, therefore, essential that all organizations develop a professional means to identify the strategic changes they need to make in a structured and professional manner (as opposed to ad hoc). They then need to implement these strategic changes through a structured management system so that they can realize benefits for the parent company and its shareholders.

To manage these strategic changes Advanced Project Management will explain how client organizations can adopt a systems approach through their project sponsors to develop and implement new corporate strategies using an integrated project methodology. The risk being that, if the executives do not use a project methodology, their innovative visions and ingenious strategies might be self-limiting.
6. Who is the Project Sponsor?

Most books on project management focus on the ‘project’ and how the ‘project manager’ manages the planning and control system. This book will focus on the project environment from the client’s perspective and how the project sponsor manages a company-wide project methodology to develop and implement corporate strategy and realize benefits for the company. In this case, the project sponsor’s responsibility is to manage or oversee the following:

- The development of corporate direction (vision, mission and values statements)
- The identification of corporate needs and opportunities (statement of requirements)
- The development of corporate strategies to address the needs and exploit the opportunities (business case)
- The execution of the new strategy (feasibility study, design, execute and commission the project)
- The operational start-up of the project and handover to the operations manager
- The realization of benefits for the client company (solve problems, return on investment).

See the Project Organization Structure chapter for a discussion on the role of the project sponsor.
7. Project Success

The ultimate purpose of a company and a project is to be successful. This section will discuss the meaning of success as it relates to the project sponsor and the project manager.

The media are always quick to portray projects that were late and over budget as a failure. Both the building of the Concorde and the Sydney Opera House were projects which fell into that category, but were they really failures? To answer this question we have to clarify how to determine project success, and that will be shown to depend on from whose perspective it is being considered.

**Project Manager’s Perspective:** Project success from the project manager’s perspective is related to delivering the project deliverables. These deliverables are usually quantified and verified using project management critical success factors. The classic question would be to ask, ‘Was the project delivered on time, on budget and to the required quality?’ If the answer is ‘yes’ to all of these questions then the project would be deemed to have been a success from the project manager’s perspective.

**Case Study - Concorde**

When Britain and France built Concorde (1960s) the vision of both governments was to pioneer supersonic flight. Even though Concorde was late and over budget it did achieve its technical objectives by flying at supersonic speed. Initially, Concorde was a commercial failure because it took a number of years to acquire landing rights to fly across the Atlantic. However, it eventually became a corporate success as both BA and Air France adopted it as their flagship – the only airlines offering supersonic flights.

*Photo: Concorde - the only supersonic commercial aircraft*
**Project Sponsor’s Perspective:** Project success from the project sponsor’s perspective generally relates to the realization of benefits for the company. These benefits are usually quantified as developing and implementing corporate strategy to solve a problem, address a need, maintain competitive advantage, exploit an opportunity, increase profit, increase sales figures, or enhance a brand image.

This means that the project sponsor and project manager have different criteria for determining project success and, if a project's success is only considered from the project manager’s perspective, this can be misleading, particularly if it relates to a project in a changeable market.

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**Case Study - Sydney Opera House**

The NSW Government's original vision (1950s) was for a suitable venue for large theatrical productions. A design competition was held and Jorn Utzon’s innovative design of the Sydney Opera House selected.

The building of the Sydney Opera House did not go smoothly; it was late, over budget and reported to be an ‘aesthetic and acoustic disaster’. It was generally deemed a failure from a project manager’s perspective.

But now the Sydney Opera House is one of Australia’s national icons and tourist attractions. It is described as a World Heritage building of which UNESCO says, *the Sydney Opera House is a great architectural work of the 20th century. It represents multiple strands of creativity, both in architectural form and structural design, a great urban sculpture carefully set in a remarkable waterscape and a world famous iconic building.*

Therefore, from a client’s perspective the project is considered a resounding success.

*Photo: Sydney Opera House, courtesy of Angelica Payne - shows the Opera House's innovative and impressive architecture*
Case Study - London’s Millennium Bridge

The City of London’s vision (1990s) was to provide a means for pedestrians to cross the River Thames between St Paul’s Cathedral on the north side, and the Tate Modern art gallery on the south side, to be opened in 2000 and, therefore, to be called the Millennium Bridge. The business case was to build an innovative footbridge that looked like a ‘blade of light’ with the suspension below the bridge to give a shallow profile.

The bridge was originally built on time, and accepted by the client. It would have been deemed a project manager’s success except that, within a couple of days, the bridge had to be closed due to the excessive swaying movement caused by pedestrians crossing the bridge. The engineers discovered that as people walked across, in step, the oscillation caused was close to the bridge’s natural frequency and produced severe resonance. From a client’s perspective the bridge was initially a failure because it had to be closed, but the bridge was redesigned and stiffened and, finally, two years later it was reopened and the client was able to realize the benefits.

Exercises:

Using the above definitions of project manager success and project sponsor success consider the following projects from the perspective of both parties:

1. The Airbus A380 super jumbo.
2. The Apple iPhone.
3. The Channel Tunnel.
The Project Lifecycle, or project life span, subdivides the project into a number of separate phases where each phase produces a distinct deliverable or result. As the project progresses it will pass through a number of these phases from conception to completion. The structure of the project lifecycle naturally forms the backbone of most, if not all, project methodologies. It is, therefore, essential that the project sponsor understands the characteristics and features of the project lifecycle.

This chapter will explain how the project lifecycle enables the project sponsor to look at the total project to see how it can be subdivided into a logical sequence of phases along the project’s timeline.

The project sponsor’s challenge is to group the work into distinct phases so that the project can make the best use of company resources and ensure each phase produces a meaningful deliverable that contributes towards achieving the project’s objectives.
1. Project Management Techniques (4Ps)

There are four key project management techniques (referred to in this book as the 4Ps of project management) that form the structure of most project methodologies:

- **Phases:** The *Project Lifecycle* (this chapter) explains how the project timeline can be subdivided into a number of phases, and how the level of effort, level of influence and costs vary over the project's lifecycle.

- **Processes:** The *Project Management Process* explains how each project phase can be subdivided into a number of management process groups to initiate, plan, execute and close the phases.

- **Plans:** The *Project Plan* explains how each project process can be subdivided into a number of individual plans that combine to form the baseline plan, which is used to plan and control the project's performance.

- **People:** The *Project Organization Structure* explains how the leadership and management of the project personnel and other interested stakeholders can be discussed as project organization structures, lines of communication, responsibility and authority.

![Figure 2.1: Project Management Techniques (4Ps) – shows a breakdown of the key project management techniques that form the backbone of most project methodologies](image)

This chapter will explain the principles of the project lifecycle technique, while the next three chapters will explain the principles of the other three key project management techniques.

The *Fusion Method XYZ© (Project Methodology)* chapter will show how the four project management techniques can be combined to form the structure of a project methodology systems approach to develop and implement corporate strategy.
A management process is a systematic series of actions or functions to bring about a desired change or result. In the project management context a project management process consists of four key actions: initiation, planning, execution and closing. It is, therefore, essential that the project sponsor understands the characteristics and features of the project management process.

This chapter introduces a number of different types of processes before explaining how to use the project management process.

The project sponsor’s challenge is to clarify the confusion between a project process and a project plan. This is particularly important, because the project methodology uses the project management process to manage the phases and the project plan to manage the knowledge areas.
1. Project Management Techniques (4Ps)

There are four key project management techniques (referred to in this book as the 4Ps of project management) that form the structure of most project methodologies:

- **Phases:** The *Project Lifecycle* explains how the project timeline can be subdivided into a number of phases, and how the level of effort, level of influence and costs vary over the project's lifecycle.

- **Processes:** The *Project Management Process* (this chapter) explains how each project phase can be subdivided into a number of management process groups to initiate, plan, execute and close the phases.

- **Plans:** The *Project Plan* explains how each project process can be subdivided into a number of individual plans that combine to form the baseline plan, which is used to plan and control the project's performance.

- **People:** The *Project Organization Structure* explains how the leadership and management of the project personnel and other interested stakeholders can be discussed as project organization structures, lines of communication, responsibility and authority.

![Diagram](image)

*Figure 3.1: Project Management Techniques (4Ps) – shows a breakdown of the key project management techniques that form the backbone of most project methodologies*

This chapter will explain the principles of the project management process technique, while the previous chapter and the two following chapters will explain the principles of the other three key project management techniques.

The *Fusion Method XYZ® (Project Methodology)* chapter will show how the four project management techniques can be combined to form the structure of a project methodology systems approach to develop and implement corporate strategy.
A plan is a means of achieving an objective. A project plan is a means of achieving a project’s objectives. A project plan brings together a number of individual plans to form the baseline plan. The project plan is also referred to as the project management plan, the project execution plan, the project implementation plan, the project initiation document (PID) in PRINCE2 or, simply, the plan. This text will use the terms the project plan or the baseline plan, but using the other terms would be equally correct. Project planning and control is a fundamental project management skill used to outline how to achieve the project’s goals and objectives. It is, therefore, essential that the project sponsor understands the characteristics and features of the project plan.

This chapter will explain how to develop a project plan to plan and control the project to achieve its objectives.

The project sponsor’s challenge is to develop a project plan that optimizes all the individual plans through a process of managed trade-offs and compromises.
1. Project Management Techniques (4Ps)

There are four key project management techniques (referred to in this book as the 4Ps of project management) that form the structure of most project methodologies:

- **Phases:** The *Project Lifecycle* explains how the project timeline can be subdivided into a number of phases, and how the level of effort, level of influence and costs vary over the project’s lifecycle.

- **Processes:** The *Project Management Process* explains how each project phase can be subdivided into a number of management process groups to initiate, plan, execute and close the phases.

- **Plans:** The *Project Plan* (this chapter) explains how each project process can be subdivided into a number of individual plans that combine to form the baseline plan, which is used to plan and control the project’s performance.

- **People:** The *Project Organization Structure* explains how the leadership and management of the project personnel and other interested stakeholders can be discussed as project organization structures, lines of communication, responsibility and authority.

![Figure 4.1: Project Management Techniques (4Ps)](image)

*Figure 4.1: Project Management Techniques (4Ps) – shows a breakdown of the key project management techniques that form the backbone of most project methodologies*

This chapter will explain the principles of the project plan technique, while the previous two chapters and the following chapter will explain the principles of the other three key project management techniques.

The *Fusion Method XYZ© (Project Methodology)* chapter will show how the four project management techniques can be combined to form the structure of a project methodology systems approach to develop and implement corporate strategy.
The project organization structure outlines the positions, responsibilities, authorities and accountabilities of all the people involved within the project methodology. This approach helps to identify who owns what, who is responsible for solving problems and making decisions, and who is responsible for executing the work. It is, therefore, essential that the project sponsor understands the characteristics and features of the project organization structure.

This chapter will explain how the Fusion Method XYZ© integrates the project organization structure and the project methodology.

The project sponsor’s challenge is to establish a project organization structure that reflects the needs of the organization and the needs of the project methodology to enable the effective implementation of corporate strategy.
1. Project Management Techniques (4Ps)

There are four key project management techniques (referred to in this book as the 4Ps of project management) that form the structure of most project methodologies:

- **Phases:** The *Project Lifecycle* explains how the project timeline can be subdivided into a number of phases, and how the level of effort, level of influence and costs vary over the project’s lifecycle.

- **Processes:** The *Project Management Process* explains how each project phase can be subdivided into a number of management process groups to initiate, plan, execute and close the phases.

- **Plans:** The *Project Plan* explains how each project process can be subdivided into a number of individual plans that combine to form the baseline plan, which is used to plan and control the project’s performance.

- **People:** The *Project Organization Structure* (this chapter) explains how the leadership and management of the project personnel and other interested stakeholders can be discussed as project organization structures, lines of communication, responsibility and authority.

**Figure 5.1: Project Management Techniques (4Ps)** – shows a breakdown of the key project management techniques that form the backbone of most project methodologies

This chapter will explain the principles of the project organization structure technique, while the three previous chapters explained the principles of the other three key project management techniques.

The *Fusion Method XYZ* © (*Project Methodology*) chapter will show how the four project management techniques can be combined to form the structure of a project methodology systems approach to develop and implement corporate strategy.

© Advanced Project Management - Fusion Method XYZ © - Rory Burke
A project methodology, also called a project management methodology or corporate methodology, is a systems approach to managing the development and implementation of corporate strategy.

This chapter will explain the fundamentals of a project methodology by defining all the components that are included in a project methodology systems approach, together with implementation issues, benefits and problems.

The project sponsor’s challenge is to understand the implications of developing and implementing a project methodology systems approach so that the company can maximize its potential by effectively developing and implementing corporate strategy.
1. Project Methodology Definitions

In the corporate context, a management methodology is a means of managing the change management process to maintain the company’s competitive advantage within its niche market. In the project context, a project methodology is a means of implementing a project or a change which, in turn, is a means of implementing corporate strategy. To avoid confusion, this book will use the term project methodology to apply to the whole change management process.

As a starting point, consider the following definitions of a project methodology systems approach from the body of knowledge, PMBOK and APM BoK, with an explanation of the terms used.

The PMBOK 3ed defines **Methodology** as, *a system of practices, techniques, procedures, and rules used by those who work in a discipline.*

The PMBOK 4ed defines a **System** as, *an integrated set of regularly interacting or interdependent components created to accomplish a defined objective, with defined and maintained relationships among its components, and the whole producing or operating better than the simple sum of its components. Systems may be either physically process based or management process based, or more commonly a combination of both. Systems for project management are composed of project management processes, techniques, methodologies, and tools operated by the project management team.*

**Synergy:** The PMBOK’s definitions clearly imply that synergy is one of the benefits of integration where the whole system produces more than the sum of the individual parts.

**System of Practices:** Practices are a specific type of professional or management activity that contribute to the execution of a process and might employ one or more tools and techniques.

The PMBOK 3ed defines a **Tool** as, *something tangible, such as a template or software program, used in performing an activity to produce a product or result.*

The PMBOK 3ed defines a **Technique** as, *a defined systematic procedure employed by a human resource to perform an activity to produce a product or result or deliver a service, and that may employ one or more tools.*

**Tools and Techniques:** The use of tools and techniques enables the project sponsor to efficiently accomplish a project activity or task.

**Procedures:** A series of steps followed in a regular and definitive order to accomplish a task (PMBOK 3ed).
This chapter will explain how to develop the Fusion Method XYZ© which is a unique project methodology that integrates a number of the key project management techniques as building blocks, namely, the project lifecycle, the project management process, the project plan, and the project organization structure.

One of the strengths of the Fusion Method XYZ© is that it is based on the widely accepted project management tools, techniques and practices as outlined in the project management bodies of knowledge – the PMBOK 4ed, the APM BoK 5ed, the IPMA ICB v3 and the USA NCB v2. This will ensure that project sponsors and project managers who have a working understanding of any of the bodies of knowledge will understand the concepts, techniques and terminology of the methodology.
1. Project Methodology Structure

This section will show how a project methodology can be developed and built-up using the management techniques already discussed in the earlier chapters, namely the 4Ps of project management:

- **Phases** - Project lifecycle
- **Processes** - Project management process
- **Plans** - Project plans
- **People** – Project organization structures.

This chapter will develop and integrate these techniques in a series of steps, indicated as follows:

**Step 1**: Subdividing the project lifecycle into ten sequential phases. This is shown in figure 7.1, the *Fusion Method XYZ©*.

**Step 2**: Managing each phase as a mini project using the project management process (initiate, plan, execute and close) and these, in turn, can be subdivided into a number of sub-processes for better definition.

**Step 3**: Subdividing each process or sub-process into a number of plans. These plans usually include all the knowledge areas of the body of knowledge, and can be managed using a planning and control system.

**Step 4**: Subdividing the project organization structure into roles and duties to allocate responsibility for initiating work and the authority to use company resources.
A Corporate Charter is an executive document that outlines the purpose and aims of the company, together with details of the company’s culture, philosophy and the way the company intends to do business. These corporate objectives are usually presented as corporate vision, mission and values statements. It is, therefore, essential that the project sponsor understands the characteristics and features of these three corporate statements.

This chapter will explain how the Fusion Method XYZ© project methodology systems approach can be used to develop strategic corporate vision and mission statements and an ethical corporate values statement.

The project sponsor’s challenge is to develop a corporate vision statement that captures the company’s visionary direction and long term objectives; a mission statement that gives short term direction; and a corporate values statement that aligns the corporate ethics and governance with accepted business and environmental practices.
1. Project Methodology Lifecycle

The Fusion Method XYZ© project methodology lifecycle shows the relative position of the corporate charter phase with respect to the other phases (see figure 8.1 below). The corporate charter phase (first phase) develops the corporate vision and mission statements to give the company strategic direction and the corporate values statement to outline how the company intends to do business.

<table>
<thead>
<tr>
<th>Corporate Charter</th>
<th>Corporate Needs and Opportunities</th>
<th>Corporate Strategy</th>
<th>Project Feasibility Study</th>
<th>Project Definition</th>
<th>Project Execute</th>
<th>Project Comm</th>
<th>Operation Start-Up</th>
<th>Project Upgrade</th>
<th>Project Disposal</th>
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<td>Phase charter</td>
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<tr>
<td>Vision, mission and values statements</td>
<td>Statement of requirements</td>
<td>Business case</td>
<td>Project feasibility study</td>
<td>Project design, project plan</td>
<td>Execution closeout report</td>
<td>Project closeout report</td>
<td>Operation start-up closeout report</td>
<td>Project Upgrade proposal</td>
<td>Disposal closeout report</td>
</tr>
</tbody>
</table>

Figure 8.1: Project Methodology Lifecycle - shows the relative position of the corporate charter phase with respect to the other phases

The corporate charter phase is shown leading the project methodology because the corporate vision, mission and values underpin and influence the company's strategic direction and outline how the company intends to do business. The corporate charter phase should, therefore, be in place before the next phase, the corporate needs and opportunities phase, is initiated.

In an established organization, the corporate vision, mission and values statements should already be in place, but for the purposes of explaining how a project methodology systems approach works, this chapter will assume that the company is either a start-up new venture or a company updating its corporate charter. Setting up a corporate charter would also apply to a newly formed consortium and syndicate brought together for a public private partnership (PPP). In practice, all companies should revisit their corporate vision, mission and values statements on a regular basis to ensure they reflect the wishes and aspirations of the shareholders and stakeholders, and incorporate the feedback from the other phases.
In our rapidly developing world, products and services only have a short window of opportunity before changes in the market place and/or new technology makes them obsolete. This means that companies need to be continually monitoring what is happening in their market so they can develop strategies to respond to change or, even better, possibly lead change. In this situation, companies have to develop new strategies to stay in business while, at the same time, make a respectable return on the shareholders’ investment.

These corporate needs and opportunities are usually presented as a statement of requirements. It is, therefore, essential that the project sponsor understands the characteristics and features of the statement of requirements.

This chapter will explain how a project methodology systems approach can be used to develop a structured statement of requirements that considers the company’s competitive capability with respect to the market and the environment within which the company operates.

The project sponsor’s challenge is to develop a statement of requirements that accurately identifies the key needs that have to be addressed to maintain competitive advantage to stay in business, and the best opportunities the company could feasibly exploit to achieve the company’s long term objectives as outlined in the corporate vision statement.
1. Project Methodology Lifecycle

The *Fusion Method XYZ*® project methodology lifecycle shows the relative position of the corporate needs and opportunities phase with respect to the other phases (see figure 9.1 below). The corporate needs and opportunities phase (second phase) identifies what the company needs to do to maintain competitive advantage to stay in business, and what opportunities the company could exploit to achieve the corporate charter (vision, mission and values statements).

<table>
<thead>
<tr>
<th>Corporate Charter</th>
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<td>Disposal closeout report</td>
</tr>
</tbody>
</table>

**Figure 9.1: Project Methodology Lifecycle** – shows the relative position of the corporate needs and opportunities phase with respect to the other phases

This phase (corporate needs and opportunities phase) cannot start until the previous phase (corporate charter phase) is complete. This is because the corporate vision, mission and value statements have to be in place first, as they establish the purpose and direction of the company against which the needs and opportunities are developed. The corporate vision, mission and values statements are, therefore, input documents required before the corporate needs and opportunities phase can be initiated.

The corporate needs and opportunities phase will be followed by the corporate strategy phase (next chapter) which will develop one or more business case solutions to address the needs and opportunities identified in this phase.
The corporate strategy is the conscious and concerted effort by the company executives to identify ways to address the corporate needs and opportunities as outlined in the statement of requirements. These corporate strategies are usually presented as a business case. It is, therefore, essential that the project sponsor understands the characteristics and features of a business case.

This chapter will explain how a project methodology systems approach can be used to develop structured business cases that present possible solutions to address the problems, needs and opportunities outlined in the statement of requirements.

The project sponsor's challenge is to produce a business case that presents creative but realistic and efficient solutions to solve the problems and needs, and innovative ways to exploit the opportunities, that are identified in the statement of requirements. The business cases must not only justify the use of company resources but, most importantly, also align with the corporate vision, mission and values statements, while avoiding exposing the company to unnecessary risks.
1. Project Methodology Lifecycle

The *Fusion Method XYZ* project methodology lifecycle shows the relative position of the corporate strategy phase with respect to the other phases (see figure 10.1 below). The corporate strategy phase (third phase) develops business cases or proposals as solutions to address the statement of requirements developed in the needs and opportunities phase (previous phase).

![Figure 10.1: Project Methodology Lifecycle](image)

**Figure 10.1: Project Methodology Lifecycle** – shows the relative position of the corporate strategy phase with respect to the other phases

This phase (corporate strategy phase) cannot start until the previous phase (corporate needs and opportunity phase) is complete. This is because the problems, needs and opportunities must be identified first before solutions or business case(s) can be developed to either solve the problem or take full advantage of and exploit the opportunities. This means that the statement of requirements is an input document required before the corporate strategy phase can be initiated.

The corporate strategy phase will be followed by the project feasibility study phase (next chapter), which will analyse the business cases to confirm that they are feasible (or not) and that they are making good use of the company’s resources.
Companies invariably have a long list of jobs to complete and an extensive wish list of great ideas and opportunities to exploit. But with limited resources the company’s executives will have to impose a form of capital rationing. This is why the project sponsor will have to conduct a project feasibility study to not only confirm that the proposed business cases are feasible, but also to prioritize the business cases so that the most viable can be carried out first. It is, therefore, essential that the project sponsor understands the characteristics and features of the project feasibility study.

The previous chapter discussed how the corporate strategy phase developed a business case to respond to the statement of requirements. This chapter will take the Fusion Method XYZ© project methodology systems approach a step further and perform a feasibility study on the business case to confirm that it is feasible.

The project sponsor’s challenge is to analyse every aspect of the business case to confirm that it is likely to achieve its stated objectives. This will involve clarifying the client’s needs, confirming that the business case will address those needs, and that the project is feasible within the identified constraints. If there are a number of business cases all vying for the same pot of the company’s funds, then the project sponsor must develop a means to prioritize the business cases so that they can be selected progressively as the resources and funds become available.
1. Project Methodology Lifecycle

The Fusion Method XYZ© project methodology lifecycle shows the relative position of the project feasibility study phase with respect to the other phases (see figure 11.1 below). The project feasibility study phase (fourth phase) confirms that the business case, developed in the previous phase, is feasible (finance, build-method and operational configuration) and is making the best use of the company’s resources.

This phase (project feasibility study phase) cannot start until the previous phase (corporate strategy phase) is complete; this is because the business case must be developed first before a feasibility study can be conducted on it. This means that the business case is an input document required before the project feasibility study phase can be initiated.

The project feasibility study phase will be followed by the project definition phase (next chapter) which will produce a detailed project design and fully integrated project plan for the selected project.
The project definition phase develops the preferred business case into a detailed project design and fully integrated project plan. The project design process produces the project design, and the project planning process produces the project plan. It is, therefore, essential that the project sponsor understands the characteristics and features of the project design and project plan (see Project Plan chapter).

The previous chapter discussed how the project feasibility study selects the preferred business case and confirms that the proposal should achieve the objectives within the defined constraints. This chapter will take the project methodology systems approach a step further and explain how to produce a detailed project design.

The project sponsor’s challenge is to produce a project design that is easy to build (project build-method) and efficient to operate (operation configuration). Other considerations include; complying with regulations, achieving an appropriate level of technical innovation, and producing an aesthetically pleasing design.
1. Project Methodology Lifecycle

The *Fusion Method XYZ©* project methodology lifecycle shows the relative position of the project definition phase with respect to the other phases (see figure 12.1 below). The project definition phase (fifth phase) produces a detailed design of the project and a detailed baseline plan to manage the project.

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<th>Corporate Charter</th>
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<th>Corporate Strategy</th>
<th>Project Feasibility Study</th>
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<td>Vision, mission and values statements</td>
<td>Statement of requirements</td>
<td>Business case</td>
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**Figure 12.1: Project Methodology Lifecycle** – shows the relative position of the project definition phase with respect to the other phases

This phase (project definition phase) cannot start until the previous phase (project feasibility study phase) is complete. This is because it is the project feasibility study that selects which business case (project) will be designed. It would be a waste of effort to produce a detailed design for every business case, because a number of the business cases might not be selected and, if they were, the scope of work might change. This means that the project feasibility study report is an input document to initiate the project definition phase.

The project definition phase will be followed by the project execution phase (next chapter) which will implement or construct the project as outlined in the project definition. It is for this reason that some practitioners argue that the project definition phase is the most important phase, because the execution phase should only implement what the project definition phase designs.

In some industries the project design process and the project planning process are performed by different companies, and these companies could be located in different countries. This means that although the two processes are interlinked, they could be run in parallel.
The project execution or construction phase makes the deliverable(s) of the project. Many companies see this as the most important phase because this is where the greatest level of effort is exerted and the largest part of the budget is spent. For other companies the project execution phase is seen as simply implementing the project design as per the project plan. It is, therefore, essential that the project sponsor understands the characteristics and features of project execution.

This chapter will take the Fusion Method XYZ© project methodology systems approach a step further and explain how to develop a project build-method and a project execution strategy to manufacture the project as per the approved project design and the agreed project plan.

The project sponsor’s challenge is to develop a project execution strategy that balances the resource capabilities of the company and its contractors with the project build-method and the acceptable level of corporate risk.
1. Project Methodology Lifecycle

The Fusion Method XYZ© project methodology lifecycle shows the relative position of the project execution phase with respect to the other phases (see figure 13.1 below). The project execution phase (sixth phase) manufactures, produces or constructs the project, product, facility or service as per the project design and the baseline plan.

![Figure 13.1: Project Methodology Lifecycle](image)

This phase (project execution phase) cannot start until the previous phase (project definition phase) is complete. This is because the project execution cannot start before the project design and the baseline plan are finished and approved. This means that the approved project design and agreed project plan are input documents required before the project execution phase can be initiated.

The project execution phase will be followed by the project commissioning and handover phase (next chapter) that tests, commissions and approves the project before handing it over to the operations manager to go live.

Execution, in the project management context, is the manufacture, construction or carrying out of the plan. In practice, every phase includes an execution process to produce a deliverable. The main difference with this phase is that this deliverable is the project.
Project Commissioning and Handover Phase

Executive Outcomes
This chapter includes:
- Project commissioning process
- Project handover to client
- Terminating the project

The project commissioning process officially verifies, tests and documents that the project work has been completed to the required condition and functions as per the requirements outlined in the project definition documents (project design and project plan). In the handover process the project is officially accepted and handed over to the client for operation. It is, therefore, essential that the project sponsor understands the characteristics and features of the project commissioning and handover process.

The previous chapter discussed how the project execution phase produces the project’s deliverables. This chapter will take the project methodology systems approach a step further and explain how to commission a project and then hand it over to the client for operation.

The project sponsor’s challenge is to ensure the commissioning process adequately tests the performance of the project to confirm that all the systems function as per the design, and also ensure that the ownership of the project is properly handed over to the client for operation.
1. Project Methodology Lifecycle

The Fusion Method XYZ© project methodology lifecycle shows the relative position of the project commissioning and handover phase with respect to the other phases (see figure 14.1 below). The project commissioning phase (seventh phase) tests the product or service to confirm that it has been made to the approved design, and its performance meets the needs and expectations of the stakeholders. And, in the project handover process, the client officially accepts the project for operation.

This phase (project commissioning and handover phase) cannot start until the previous phase (project execution phase) is complete. This is because the project commissioning and handover phase cannot start before the project execution phase is finished and approved for commissioning – fast tracking accepted. This means that the ‘approved for commissioning’ certificate and execution closeout report from the project execution phase are input documents required before the project commissioning and handover phase can be initiated.

The project commissioning and handover phase will be followed by the operation start-up phase (next chapter) that will start-up or implement the project to function in its operating environment.

Commissioning, in the project management context, is the testing and confirmation that the project has been made to the required design and plan. In practice, every phase includes a commissioning and handover process to confirm that the deliverables are acceptable. The main difference with this phase is that this deliverable is the whole project.

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**Figure 14.1: Project Methodology Lifecycle** – shows the relative position of the commissioning and handover phase with respect to the other phases

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Operational Start-Up Phase

Fusion Method XYZ©

Executive Outcomes
This chapter includes:
- Pilot project
- Phase-in/phase-out
- The ‘big bang’ approach

The disastrous launch of London’s Heathrow Terminal 5 in 2008 should serve as a reminder that the operation start-up (or operational start-up) needs to be considered as a mini project or phase within the whole change management process, otherwise it might become the weak link as the project is brought to market and goes live. It is, therefore, essential that the project sponsor understands the characteristics and features of an operational start-up process.

The previous chapter discussed how to commission and handover the project to the client or operations manager. This chapter will take the project methodology systems approach a step further and explain how to manage the operational start-up phase as a mini project.

The project sponsor’s challenge is to select an appropriate project implementation strategy that balances the efficient start-up of the project with the company’s acceptable level of risk. The operational start-up process is the project sponsor’s opportunity to achieve the main objective of the change to realize benefits for the company. This would then mark the end of the project sponsor’s involvement in the project.
1. Project Methodology Lifecycle

The Fusion Method XYZ® project methodology lifecycle shows the relative position of the operational start-up phase with respect to the other phases (see figure 15.1 below). The operational start-up phase (eighth phase) implements the new project within its operating environment.

This phase (operational start-up phase) cannot start until the previous phase (project commissioning and handover phase) is complete. This is because the operational start-up cannot begin until the project has been commissioned, accepted and formally handed over to the operations department. This means that the client’s acceptance certificate from the project commissioning and handover phase is an input document required before the operational start-up phase can be initiated.

For the client organization, initiating the operational phase to produce a product or operate a facility is the whole purpose of carrying out the project, because now the company can reap the benefits of its business case strategy and project.

During the operational phase there will be embedded mini projects to maintain and repair the facility. At some time in the future there will probably be an upgrade project to keep the facility operating commercially and efficiently and, eventually, the project will be decommissioned and disposed of, returning the site to its original state.
A project upgrade or expansion is a half-life refit to keep the facility running efficiently and competitively. With continuous developments in new technology, market changes, increasing competition and new regulations, all projects will eventually become obsolete. If companies wish to remain in business they will have to continuously consider upgrading their project facilities or services. It is, therefore, essential that the project sponsor understands the characteristics and features of a project upgrade.

This chapter will discuss the project upgrade implications that should be considered while the project is still in the corporate strategy and project definition phases.

The project sponsor’s challenge is to ensure that the corporate strategy and project definition phases consider the ease of upgrading the project later in the project lifecycle. It is quite possible that small design considerations, made during the early phases, could have huge cost savings and minimize the disruption during the project upgrade phase many years later.
1. Project Methodology Lifecycle

The Fusion Method XYZ© project methodology lifecycle shows the relative position of the project upgrade phase with respect to the other phases (see figure 16.1 below). The project upgrade phase (ninth phase) up-dates the facility with the latest technology and systems to enhance its competitive advantage.

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**Figure 16.1: Project Methodology Lifecycle** – shows the relative position of the project upgrade phase with respect to the other phases

The upgrade phase is shown in figure 16.1 as a separate phase but, in practice, it is really a mini project in its own right embedded within the operation phase.

The project upgrade phase is followed by another operation period after which there will either be another project upgrade phase or the project will be decommissioned and disposed of.
All projects, products and facilities eventually come to the end of their operational life – nothing lasts forever. This means that companies need to plan how they will decommission and dispose of their projects. It is, therefore, essential that the project sponsor understands the characteristics and features of the project decommissioning and disposal.

This chapter will discuss how the Fusion Method XYZ© project methodology systems approach can be used to manage the decommissioning of a project to remove it from service, and how to manage the disposal of a project to return the site to its natural state.

The project sponsor’s challenge is to ensure that the decommissioning and disposal of a project does not become the forgotten end of the project lifecycle, being so far into the future that the planners might conveniently gloss over the detail and mechanism of decommissioning and disposal of the project.

The project decommissioning challenge is to safely shut down the project, remove it from service and inform the stakeholders, while minimizing the impact on the company. The project disposal challenge is to safely dispose of the project in an environmentally sustainable manner and return the site to its original state.
1. Project Methodology Lifecycle

The Fusion Method XYZ© project methodology lifecycle shows the relative position of the project decommissioning and disposal phase with respect to the other phases (see figure 17.1 below). The project decommissioning and disposal phase (tenth phase) decommissions the project (shuts it down) and disposes of the project (removes the project and returns the site to its original state).

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**Figure 17.1: Project Methodology Lifecycle** – shows the relative position of the project decommissioning and disposal phase with respect to the other phases.

This phase (project decommissioning and disposal phase) is the last phase in the project methodology lifecycle – this is the end of the project’s working life. The decision to decommission and dispose of the project will be an input document, together with the agreed method of decommissioning and disposal that should refer back to the original business case and project plan.

The discussion will focus on the decommissioning and disposal implications that should be considered while the project is in the design phase. Decisions made in the project design phase will directly impact on the ease of decommissioning and disposal of the project many years later.
Projects are not performed in a vacuum – they are performed within a company, within an industry, and within a market. They involve a wide range of people who have a wide range of needs and expectations. These people are called stakeholders or interested parties. It is, therefore, essential that the project sponsor understands the characteristics and features of the stakeholders’ analysis to determine their needs and expectations.

This chapter will explain how the Fusion Method XYZ© project methodology systems approach can be used to develop a stakeholders’ analysis from the project sponsor’s perspective.

The project sponsor’s challenge is to use a structured approach to identify, influence and manage the key stakeholders within each phase. This will enable the project sponsor to encourage the stakeholders and the company to converge on an optimum set of requirements that align with their individual needs and expectations.
1. Project Methodology Lifecycle

The Fusion Method XYZ© project methodology lifecycle shows the relative position of the stakeholders within each phase, and how their needs and expectations within each phase are interlinked by a common thread to produce the phase deliverables and, ultimately, to implement corporate strategy and achieve the corporate long term objectives (see figure 18.1 below). The stakeholders’ analysis identifies the different stakeholders so that their needs and expectations can be influenced, aligned and managed.

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<th>Corporate Charter</th>
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**Figure 18.1: Project Stakeholders** – shows how the stakeholders’ skills are interlinked by a common thread to achieve the corporate objectives

A stakeholders’ analysis is usually approached by subdividing the stakeholders into a number of categories or types and then analysing their needs and expectations. This chapter will take the stakeholders’ analysis approach a step further and show how the stakeholders can change with each phase of the project methodology, and further, how the stakeholders can be subdivided into the different organizational levels:

- Stakeholders vs. project phase
- Stakeholders vs. organizational level.
In a dynamic and changeable world the project sponsor will always be faced with a number of problems, challenges and opportunities. It is the project sponsor’s ability to develop ingenious solutions, and make sound decisions to steer the project through a minefield of obstacles, that will determine the company’s success. It is, therefore, essential that the project sponsor understands the characteristics and features of the decision-making process.

This chapter will show how the *Fusion Method XYZ*© uses an iterative decision-making spiral, coupled with a level of information polar diagram, to solve problems and make decisions. The iterative decision-making spiral (figure 19.3) shows the factors to be considered, and the level of information polar diagram (figure 19.5) shows the required level of detail and accuracy of information at each decision point.

The project sponsor’s challenge is to identify what decisions need to be made, when they need to be made, who is responsible, and who has the authority to commit company resources so that the project can make the best use of the resources. This ensures each phase produces the right deliverable to contribute towards achieving the project’s objectives.
1. Project Methodology Lifecycle

The *Fusion Method XYZ*© project methodology lifecycle shows the relative position of the key decisions within each phase, and how the decisions within each phase are interlinked by a common thread to produce the phase deliverables and, ultimately, to implement the corporate strategy and achieve the corporate long-term objectives (see figure 19.1 below).

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<th>Corporate Charter</th>
<th>Corporate Needs and Opportunities</th>
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**Figure 19.1: Project Methodology Lifecycle Decisions** – shows the decisions required to start and finish each phase

A decision by the project sponsor should be seen as a commitment of company resources. Therefore, each decision in figure 19.1 should be seen as a decision to either start committing company resources, or to continue committing company resources.

The decision to start each phase commits the funds and resources to proceed with the current phase only; a separate decision will be required to start the following phases. Some phases will be more expensive than others; the most expensive is usually the project execution phase. There are typically three types of decision points embedded within each phase:

**Decision to Initiate the Phase:** Although a go/no-go decision to proceed to the next phase will have been made at the end of the previous phase, in practice, this decision should be revisited. This will give the project sponsor the opportunity to consider the latest information, add comments, express concerns and identify any new constraints, together with writing the phase charter, appointing the project manager and assigning company resources.

**Decision to Start Each Process:** The go/no-go decision to start each process, subprocess or job is really an intermediate decision point to confirm that the fundamentals are still supporting the need for the project. If at any time during the phase, the evidence suggests that there is no point in continuing with the project, then the project should be terminated.

**Decision to Accept the Deliverable:** The go/no-go decision to accept the deliverable and proceed to the next phase is the last decision made within each project phase.
Projects and phases do not suddenly happen; there is always an initiation process. The document that officially initiates a project is called the **project charter**, and the document to officially initiate a phase is called a phase charter. It is, therefore, essential that the project sponsor understands the characteristics and features of a project charter and a phase charter.

This chapter will discuss how the *Fusion Method XYZ©* project methodology systems approach can be used to develop a project charter and a phase charter to officially initiate the project or phase.

The project sponsor’s challenge is to write a project charter which clearly translates the approved business case’s strategic objectives into achievable project objectives that can be used to initiate the project. And, at the phase level, the project sponsor’s challenge is to write a phase charter which clearly subdivides the project objectives into a number of phase objectives or deliverables.
1. Project Methodology Lifecycle

The Fusion Method XYZ© project methodology lifecycle shows the relative position of the project charter which initiates the project feasibility study phase and, also, the relative position of the phase charters that initiate each phase (see figure 20.1). The project charter is the official document to initiate the project, and the phase charter is the official document to initiate the phases.

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Figure 20.1 Project Charters – shows the relative position and extent of the different charters

Figure 20.1 shows that there are three different types of charters used within the Fusion Method XYZ© project methodology systems approach, namely:

- Corporate Charter
- Project Charter
- Phase Charter.
This chapter will outline a special method of raising funds to finance a project, called Project Finance. In this context, project finance is the term used to describe how finance is raised directly to fund the project and is, subsequently, repaid directly by the operation and income of the project. This type of financing can be used to fund large capital infrastructure projects through a public private partnership (PPP) agreement. It is, therefore, essential that the project sponsor understands the characteristics and features of project finance and PPPs.

This chapter will explain how the Fusion Method XYZ© project methodology systems approach can be used to raise funds to finance the project, using the project finance method and the public private partnership (PPP).

The project sponsor’s challenge is to determine what funds need to be raised by project finance and to raise them in such a way that the financial rewards balance the financial risks. This ensures that the financial risks are apportioned to the parties who are best equipped and most able to deal with them.
1. Project Methodology Lifecycle

The Fusion Method XYZ© project methodology lifecycle shows the relative position of the project finance function within each phase, and how the project finance function within each phase is interlinked by a common thread to finance the phase deliverables which, ultimately implement corporate strategy (see figure 21.1 below). The project finance function outlines how the project will be financed and how the funds will be repaid through the profitable operation of the project.

<table>
<thead>
<tr>
<th>Corporate Charter</th>
<th>Corporate Needs and Opportunities</th>
<th>Corporate Strategy</th>
<th>Project Feasibility Study</th>
<th>Project Definition</th>
<th>Project Execute</th>
<th>Project Comm</th>
<th>Operation Start-Up</th>
<th>Project Upgrade</th>
<th>Project Disposal</th>
</tr>
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<tr>
<td>Determine acceptable level of corporate borrowing and level of risk</td>
<td>Identify sources of project finance</td>
<td>Propose the projects that will use project finance</td>
<td>Raise funds by project finance to pay for the project</td>
<td>Repay the debit from the profitable operation of the project</td>
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<tr>
<td>Vision, mission and values statements</td>
<td>Statement of requirements</td>
<td>Business case</td>
<td>Project feasibility study</td>
<td>Project design, project plan</td>
<td>Execution closeout report</td>
<td>Project closeout report</td>
<td>Operation start-up closeout report</td>
<td>Project upgrade proposal</td>
<td>Disposal closeout report</td>
</tr>
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</table>

**Figure 21.1: Project Finance** – shows how the project finance function runs through the project methodology lifecycle like a thread

**Project Sponsor:** It is generally accepted that the project sponsor, as the client's representative, is responsible for raising the funds to finance the project and obtain a beneficial return on the investment.

Project finance should not be confused with **project cost management**, which is the project manager’s responsibility. Project cost management focuses on the cost to make the project, with the aim (critical success factor) of completing the project within budget.

One of the distinctive differences between the project sponsor and the project manager can be explained as the project sponsor looking outwards at the operation of the company in its market (to realize benefits), and the project manager looking inwards at the project to complete the project on time, within budget and quality. See figure 5.4, *Project Sponsor’s vs. Project Manager’s Focus.*
All projects are officially initiated with a project charter that sets out what the project has to achieve and how to achieve it. The flip side of the project charter is the project closeout report, which confirms that the project has been implemented as per the project charter. It is, therefore, essential that the project sponsor understands the characteristics and features of a project closeout report.

This chapter will discuss how the Fusion Method XYZ© project methodology systems approach incorporates a project closeout report to officially confirm the project has achieved the project’s objectives as outlined in the project charter.

The project sponsor’s challenge is to compile a project closeout report that confirms the project has achieved its objectives, together with capturing the feedback from all the key project participants to identify what went right, what went wrong, and lessons learnt for future projects.

At the phase level, the project sponsor’s challenge is to write a phase review which confirms the phase has achieved its objectives.
1. Project Methodology Lifecycle

The *Fusion Method XYZ®* project methodology lifecycle shows the relative position of the project closeout report with respect to the project commissioning and handover phase, the other phases in the project methodology and the project charter.

**Figure 22.1: Project Closeout Report and Phase Reviews** – shows the relative position of the project closeout report and the phase reviews

The project closeout report should not be viewed in isolation because it is linked to a number of systems:

- The project charter
- The phase charter
- The corporate charter.

**Project Charter:** The project methodology (Figure 22.1) shows the project charter initiating the project at the start of the project feasibility study phase and the project closeout report closing the project at the end of the project commissioning and handover phase. This means that the project charter is an input document for the project closeout report.

**Phase Charter:** The project methodology shows that each phase is initiated by a phase charter and closed by a phase review and, also, that each phase charter and phase review is interlinked by a common thread to achieve the corporate objectives.

**Corporate Charter:** The project methodology shows that the change process is initiated by the corporate charter (vision, mission and values). Although the corporate charter is not interlinked directly with a closeout report, it is accessed by the go/no-go decision at the start of each phase.

By formally closing each phase, the project avoids the tendency to drift into operational management. It also provides an opportunity to ensure that any unachieved goals are identified so that they can be addressed in the future.
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Acceptance Criteria: The required condition that has to be achieved before the client accepts the project deliverables.

Accountable: The state of being answerable to the person who assigned the task for the satisfactory completion of a specific task.

As-Built Drawing: A drawing that shows what work was actually done, typically focusing on where components are located.

Assumptions: The facts and figures used as the basis to develop the business case, project design and project planning.

Audit: An investigation (usually by a third party) to compare actual performance with the required work. The systematic retrospective examination of the whole, or part, of a project or function to measure conformance with predetermined standards.

Authority: The right to make decisions and the power to issue instructions to use company resources.

Baseline Plan: The original plan or reference plan against which the project’s progress is compared, monitored and controlled.

Benchmarking: A process of identifying, comparing, understanding and adapting to best practice from within and outside the organization. A review of what other organizations are doing within the same area of work. In particular, it focuses on those organizations that appear to be particularly successful in what they do and how they do it and are, therefore, taken to be examples to be emulated.

Benefit: (See realizing benefits)

Big Bang: The ‘big bang’ implementation strategy starts up the new facility on a key date or over a short period of time. This is the fastest type of implementation strategy.

BOOT (Build Own Operate Transfer): A contractual arrangement whereby a private company builds, owns, operates and then transfers the facility back to the concession owner after a specific period.

Brainstorming: A problem solving and innovative ideas generating technique where a small group of people are brought together and presented with a problem or situation to address. Through a process of interactive stimulation and bouncing ideas off each other, a flood of solutions is generated. The secret is to go for volume over a short timeframe (say 20 minutes) with no evaluation, as this would hinder the innovation process.

Brand: A company’s brand is the term used to refer to the company’s image as perceived by others, particularly potential customers. As customers become increasingly brand conscious, so branding or creating a brand image has become an important component of corporate values.

Breakdown Structure: A hierarchical structure that breaks down a project into smaller elements or work packages. Two of the most commonly used breakdown structures are the PBS (product breakdown structure) and the WBS (work breakdown structure).

Break-even Point: This is the number of products the company needs to make/sell to cover the set up costs; after this point the company starts to make a resultant profit from the project.
**Budget:** Planned allocation of funds to perform a fixed or defined scope of work.

**Build-Method:** The build-method outlines how the project manager intends to manufacture or assemble the project. The build-method takes into consideration the available resources, equipment and schedule constraints. If necessary it outlines a step-by-step method to manufacture the project.

**Business Case:** The business case process develops a solution to address the problems, needs and opportunities outlined in the statement of requirements. The business case then seeks justification and permission to use company resources for undertaking a project. If there is more than one requirement and more than one business case, then each business case seeks justification to be selected in preference to the other business cases.

**Buying Work:** This term is used to explain the competitive bidding phenomenon of lowering the company’s profit margin to improve the company’s chances of being awarded the contract.

**Capital Rationing:** When a company has a limited investment budget not all business cases will be able to be funded. In this situation, capital rationing selects the projects that are urgent, offer the best return on investment and make the best use of corporate funds.

**Cash Flow:** The flow of cash in and out of the project’s account, typically presented as a monthly snapshot.

**Champion:** Someone who acts as an advocate for a proposal (business case) or project, and who spearheads an idea or action and ‘sells it’ throughout the organization, seeking support.

**Change Control:** (See scope change control)

**Change Management Process:** At the corporate level, the change management process identifies, develops and implements corporate strategy to ensure that the company achieves the corporate vision. This will include the corporate needs to maintain competitive advantage.

**Charter:** A document that sets out the working relationships and agreed behaviour between parties (see corporate charter, project charter and phase charter).

**Closeout Report:** The process of finalizing all project matters, carrying out final project reviews, archiving project information and redeploying the remaining project team members. Often presented as a closeout report that progressively signs off the completed work, (as-built drawings) and identifies experiences and lessons learnt - what went right and what went wrong; basically useful information for the rest of the project and future projects.

**Commissioning:** The process of officially inspecting all the deliverables and documentation to confirm the project has met the required condition. This will also include an element of testing and fine-tuning the project to enable it to operate at its full potential.

**Commitment:** A willingness and drive to complete a task’s objectives and support the corporate vision.

**Communication Plan:** Outlines how to achieve the project communication objectives. This will include the collection, storage and dissemination of project information. It consists of lines of communication, a schedule of project meetings, progress reporting, documentation control and an administrative closeout.

**Competence:** The skill and capacity required to complete the project activities. In the project methodology context, a competent project sponsor implies that the project sponsor has the ability, skills and knowledge to effectively manage the project methodology to implement corporate strategy and realize benefits for the company.

**Competent:** Generally used to describe someone who is sufficiently skilled to perform a specified task or to fill a defined position (GAPPS).
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This book explains how the project sponsor can use a project methodology systems approach to develop and implement corporate strategy to realize benefits for the company.

The FUSION METHOD XYZ© integrates a number of the key project management techniques: Project Lifecycle, Project Management Process, Project Plan and Project Organization Structure to create a template that can be used to produce the corporate vision and values, identify the corporate needs and opportunities, and develop business cases.

The text uses plenty of worked examples and case studies to explain the management and decision-making process which interlinks the project phases. The text is consistent with the following bodies of knowledge; PMBOK, APM BoK, IPMA ICB, USA NCB.

Lecturer’s support material is available from (info@burkepublishing.com).

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