

# Heublin case study

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The latter requirement was important because of the diversity of the engineering department structures and personnel involved. The first author was selected as the consultant. With the consultant selected, an internal program manager for PM&C was selected. The deferral of this choice until after selection of the consultant was deliberate, to allow for development of interest and enthusiasm among candidates for this position and so that both the selected individual and the selection committee would have a clear picture of the nature of the program.

A program manager was chosen from the corporate staff (the second author). Having the key staff in place, ground rules were established as follows: The PM&C program would be developed internally to tailor it to the specific needs of the Groups. A “canned” or packaged system would limit this flexibility, which was deemed essential in this application of project management principles. The directors of the engineering departments of each of the Groups were to be alertly involved in the implementation of the PM&C system in total and for their particular Group.

This would assure the commitment to its success that derives from ownership and guarantees that those who know the needs best determine the nature of the system. [www.wiley.com/college/project/Meredith/cases/page.html](http://www.wiley.com/college/project/Meredith/cases/page.html)

To meet the above two ground rules, a thorough fundamental education in the basic principles of project management would be given to all involved in the system design. The emphasis was to be project planning as opposed to project control.

The purpose of PM&C was to achieve better performance on projects, not catch mistakes after they have occurred. Success was the goal, rather than accountability or identification of responsibility for failure.

2/2 o. Conceals & Resource The option of defining a uniform PM&C system, to be imposed on all engineering departments by corporate mandate was rejected. The diversity of projects put the weight in favor of individual systems, provided planning and control was such that success of the projects was facilitated.

The advantage to corporate staff of uniform planning and reporting was given second place to accommodation of the unique needs of each Group and the wholehearted commitment of each engineering manager to the effective use of the adopted system. Thus, a phased implementation of PM&C within Hubble was planned in advance.

These phases were: Phase 1 . Educational overview for engineering department managers. A three-day seminar with two top-level educational objectives: (1) comprehension by participants of a maximal set of project management principles and (2) explanation of the corporate objectives and recommended approach for any PM&C system.

Despite some expressed initial concern, the response to this session was positive. It was correctly perceived as the first step in a sincere attempt by corporate management to develop a jointly defined PM&C system that would be useful to the managers of projects, rather than to satisfy a corporate reporting need.

Phase II. PM&C system design. A “ gestation period” of three weeks was deliberately introduced between Phases I and II to allow for absorption, discussion, and review of the project management principles and objectives by the engineering department managers.

At the end of this period a session was called for the explicit purpose of defining the system. The session was chaired by the consultant, a deliberate choice to achieve the “ lightning rod” effect whereby any negative concern was directed to an outsider. Also, the consultant-as an outsider-could criticize and comment in ways that should not be done by the engineering department managers who will have long-term working relationships among each other.

It was agreed in advance that a consensus

www. Wiley. Com/college/project/Meredith/cases/package. Tm would be sought to the greatest possible extent, avoiding any votes on how to handle particular issues which leaves the “ nay” votes feeling that their interests have been overran en Day ten majority . IT consensus could not De conclave, teen ten Issue would be sidestepped to be deferred for later consideration; if sufficiently important then a joint solution could be developed outside the session without the pressure of a fixed closing time.

The dynamics of this design session included the development of consensus statements which were displayed on overhead transparencies to be worked into shape.

As soon as this was acceptable to the Group as a whole, one of two attending stenographers would record the agreement, leave the room and return later

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with a typed version for group consideration. The use of two group ethnographers assured that one was always in attendance. The enthusiasm expressed by the engineering department managers for this meeting was high. Phase III.

Project plan development. The output of Phase II (the set of consensus conclusions) represented both guidelines and specific conclusions concerning the nature of a PM&C system.

Recognizing that the PM&C program will be viewed as a model project and that it should be used as such, serving as an example of what is desired, the program manager prepared a project plan for the PM&C program. The remainder of this paper is primarily concerned with the discussion of this plan, both as an example of how to introduce a PM&C system and how to make a project plan. The plan discussed in this paper and illustrated in Figures 3 to 11 is the type of plan that is now required before any capital project may be submitted to the approval process at Hubble.

Phase ' V. Implementation. With the plan developed in Phase III approved, it was possible to move ahead with implementation. Implementation was in accordance with the plan discussed in the balance of this paper. Evaluation of the results was considered a part of this implementation. A feature of the guidelines developed by the engineering managers in Phase II was that a "menu" of component parts of a project plan was to be established in the corporate PM system, and that elements of this menu were to be chosen to fit the situational or corporate tracking requirements.

In the PM plan, items 6 and 7, Schedule and Resource Allocation, were combined into one section for reasons which will be described as part of the detailed discussions of the individual sections which follow. [www. Wiley. Com/college/project/Meredith/cases/package. HTML](http://www.wiley.com/college/project/Meredith/cases/package.html) In this PM system, the Introduction is an executive summary, with emphasis on the justification of the project.

This can be seen from the PM Program Introduction shown in Figure 3. It is to the advantage of everyone concerned with a project to be fully aware of the reasons for its existence.

It is as important to the technicians as it is to the engineers or the corporate financial department. When the project staff clearly comprehends the reason for the project's existence it is much easier to enlist and maintain their support and wholehearted efforts. In the Hubble PM&C system, it is expected that the introduction section of a project plan will include answers to these questions: What type of project is involved? What is the cost-benefit relationship? What are the contingency plans? Why is it being done this way (that is, why were alternatives rejected)?

Figure 3 not only illustrates this approach, but is the executive summary for the Hubble PM&C system.

[www. Wiley. Com/college/project/Meredith/cases/package. HTML](http://www.wiley.com/college/project/Meredith/cases/package.html) Figure 3: Introduction to PM&C program project plan. Both anecdotal and research inputs have established the importance of clearly stated objectives: von Classicist' " Principles of the Objective: A clearly defined, tattletale goal" (On

war, ten Modern Diary, nanas Tort projects In Dustless. Goals for a project at Hubble must be stated in terms of deliverable items.

To so state a project objective forces the definition of a clear, comprehensible, measurable ND tangible objective. Often, deliverable items resulting from a project are documents. In constructing a residence, is the deliverable item “ the house” or is it “ the certificate of occupancy”? In the planning stages of a project (which can occur during the project as well as at the beginning), asking this question is as important as getting the answer. Also, defining the project in terms of the deliverables tends to reduce the number of items which are forgotten.

Thus, the Hubble PM concept of objectives can be seen to be similar to a “ statement of work” and is not meant to encompass specifications (detailed descriptions of the attributes of a deliverable item) which can be included as appendices to the objectives of the project.

Figure 4 shows the objectives stated for the Hubble PM program. It illustrates one of the principles set for objective statement: that they be hierarchically structured, starting with general statements and moving to increasingly more detailed particular statements.

When both particular and general objectives are defined, it is imperative that there be a logical connection; the particular must be in support of the general. Ambiguity and confusion at this point is not unusual and here they exist, they are a source of considerable conflict among client, project management, and staff. Www.

Wiley. Com/college/project/Meredith/cases/packaged. HTML Figure 4:

Objectives of PM program. A project (the PM Program) satisfying the broadly expressed needs of the Introduction (Figure 3) is more precisely defined in Figure 4.

Here we see first that the primary thrust of this system is General Objectives item number 3, to provide Group personnel with the ability to do their Jobs better. We believe it is important that these general objectives, which were set in a Corporate Management Committee meeting, re not concerned with assigning blame or setting the stage for tighter corporate control, but are in fact positive goals which not only answer desires of Corporate and Group management, but also resolve issues often raised by the operational level personnel.

The specific objectives follow the general objectives in Figure 4, which is largely in accord with our own standards for expression of specific objectives in terms of deliverables. It is now apparent that this could have been carried further; but the success of the program supports the view that these objectives were good enough for their purpose.