

A twenty-nine item checklist

A Step-By-Step Approach To Successful Project Management

Accounting reports, work breakdown statements and other tools don't guarantee a project success. Your management style also has a lot to do with it.

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Many facility managers are responsible for managing projects in the areas of new and retrofit design and construction, maintenance and energy conservation. A project is a concerted effort defined by a scope of services, schedule and costs.

This article presents a step-by-step checklist that can help ensure that your projects run more smoothly with minimal complications.

Initially, it is important to understand that management and project management have different objectives. The objective of management is to stay in business for the longest period of time. The objective of project management is to complete the project and be "out of business" in the shortest period of time. Projects are the lifeblood of most companies. They are the parts that make up the whole, defined as management. (See Figure 1.) How well each project does determines how successful a company will be in any given year.

Usually facilities management departments are considered overhead by top management and generally don't get the recognition they deserve. Without much work on your part, you can reverse that opinion by indicating project-by-project savings or minimized costs. Management can easily relate to this and begin recognizing you and your department's

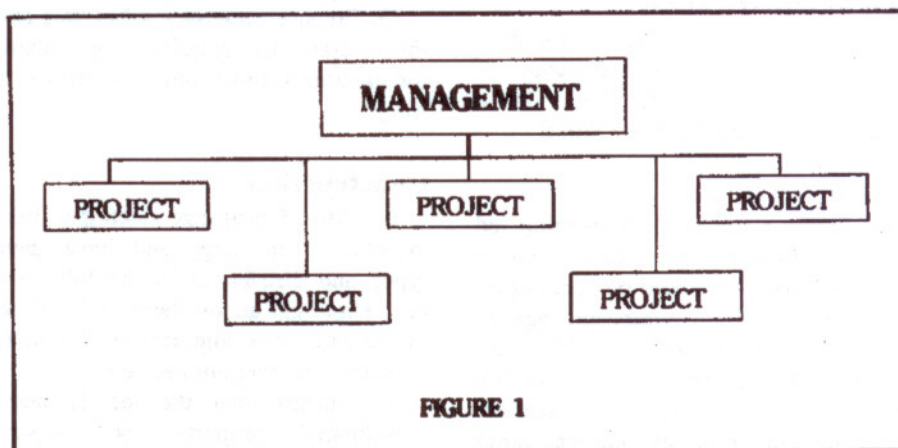


FIGURE 1

Management and project management have different objectives. The objective of management is to stay in business for the longest period of time. The objective of project management is to complete the project and be "out of business" in the shortest period of time. Projects are the parts that make up the whole, defined as management.

The biggest risk to a successful project is delay. More than any other single factor, delay will impact performance in a negative manner. Soaring construction costs and missed deadlines are usually the effects of delay. Consider any and all delays as the most formidable enemies of a successful project.

Because delays are often caused by oversights, disorganization, and miscommunications, the key elements of management - planning, organizing, directing (leading) and controlling must be consciously utilized in managing projects. Objectives must be set in writing, a plan must be developed to meet the objectives, and a method must be determined to measure progress.

communicate to team members, provide visibility and confidence, and serve as a standard of performance.

There are various techniques that can be used in project management. These include work breakdown statements, schedules, reports, progress meetings, action item lists, periodic reviews with management involvement, and accounting system reports. Although these are integral parts of managing projects, they don't guarantee success. The manner in which a project is managed by the individual will have significant impact on the success or failure of a given project.

Successful project management requires attention to detail with

"A paper trail of your actions, instructions and decisions minimizes confusion."

as a project manager for a general contractor. Your company has just executed a contract with a client for a fixed sum and the project has to be complete in a given period of time. You have just been delegated responsibility and authority to manage this project. The following checklist shows some of the steps that must be taken to ensure success.

Job Familiarization

1. Read the job file thoroughly, reviewing the contract and scope of services or plans/specifications. Use a headliner to highlight major points.

2. Visit the job site.

3. Meet all players.

4. Attend a job kick-off meeting led by estimating personnel. Other attendees should be field personnel (job superintendent) and purchasing agents. The purpose of the meeting is to review in detail the manner in which the job was estimated and to highlight equipment that requires long-lead times for ordering.

5. Set up and man the job. Arrange for a field office and materials storage trailer, telephone service, and trash service. Post required notices (OSHA, safety, workmen's compensation) and apply for permits.

6. Set up project files with separate sections for correspondence, subcontracts, purchase orders, change orders, accounting reports, progress payments and billings.

Pre-Construction

7. Attend pre-construction meetings with the client. These meetings set ground rules, define various responsibilities and provide opportunities to ask questions.

8. Buy out the project. Conclude negotiations and finalize written contracts with subcontractors and

suppliers. Order all equipment/materials that involve long lead times.

9. Review project buy-out with estimates for each fine item. Meet with accounting personnel to develop project-reporting system. Very rarely will the buyout be in sync with the estimate and it is important to relate progress against the buy-out after the project has been bought out.

10. Prepare and present a written construction schedule to the client.

11. Prepare a schedule of values by work category for billing to client. Have it reviewed and accepted by client prior to any billing.

12. Prepare list of subcontractors and major suppliers for client.

13. Prepare necessary submittals and shop drawings required by plans/specifications and submit to client (via A/E).

Construction

14. Attend progress meetings. Take minutes of meetings and have them typed and distributed by the following day. Highlight action items and follow-up on each. The importance of follow-up cannot be overemphasized.

15. Ensure that the job is being coordinated properly, is properly manned, is clean and safe, and stays on schedule.

16. Review job superintendent's daily diary regarding manning.

17. Have photographs taken periodically.

18. Ensure that time sheets are completed properly and in a timely and accurate manner.

19. Coordinate with A/E regarding field problems as they develop.

20. Review accounting reports on a timely basis and make necessary changes to keep project cost under control.

21. Do not proceed with any change orders unless directed and authorized in writing by the proper individual. Price out changes immediately.

22. Communicate with client in writing as much as possible. Significant telephone conversations should be followed up in writing. An example:

"Per our telecon, this is to confirm your oral directions..." A paper trail of your decisions, instructions and actions minimizes confusion as a project develops, -leaves no doubt as to what was communicated, and usually averts lawsuits.

23. Insist on quality work from all parties.

24. Ensure that billings are submitted on time and reviewed with the client prior to sending them out. Follow up with client on any late payments.

25. Pay invoices to subcontractors/suppliers within contract terms and conditions.

26. Plan for project close out:

- Prepare operating/maintenance manuals;
- Prepare punch lists and complete all items on a timely basis;
- Arrange for testing/balancing;
- Provide written guarantees/warranties to client;
- Gather up spare parts/materials and give them to client;
- Arrange for start-ups of equipment;
- Train client personnel;
- Prepare as-built plans;
- Assist client in arranging service agreements.

These steps are necessary to close out a project properly and to expedite retention reduction.

27. Send thank-you letter to client.

28. Arrange for post-construction meeting with client six months after project completion.

29. Write a final project report, including final financial results. Share the information with estimating.

Following the twenty-nine steps above can help you carry out your next project in a planned and well-organized manner. Attention to detail coupled with continual follow-up will help you get the project wrapped up and out-of-business as fast as possible.

The checklist can also help you get off to a fast start, which is important, because first impressions are lasting impressions.

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