PROCESSES
& DELEGATING
ways to get more done

presented by

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TODAY'S TOPICS

- Standardising processes
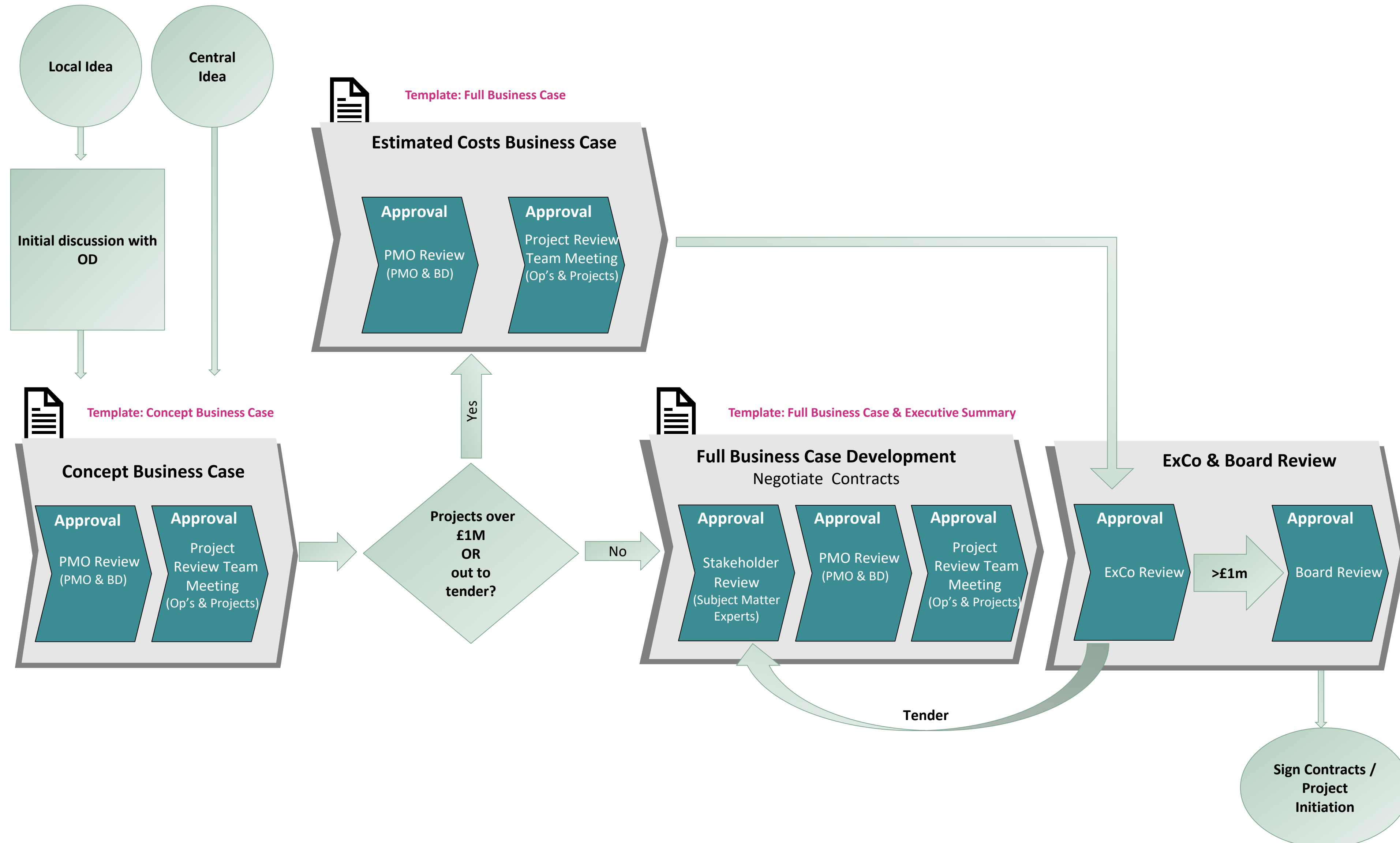 - Why
  - 5 samples
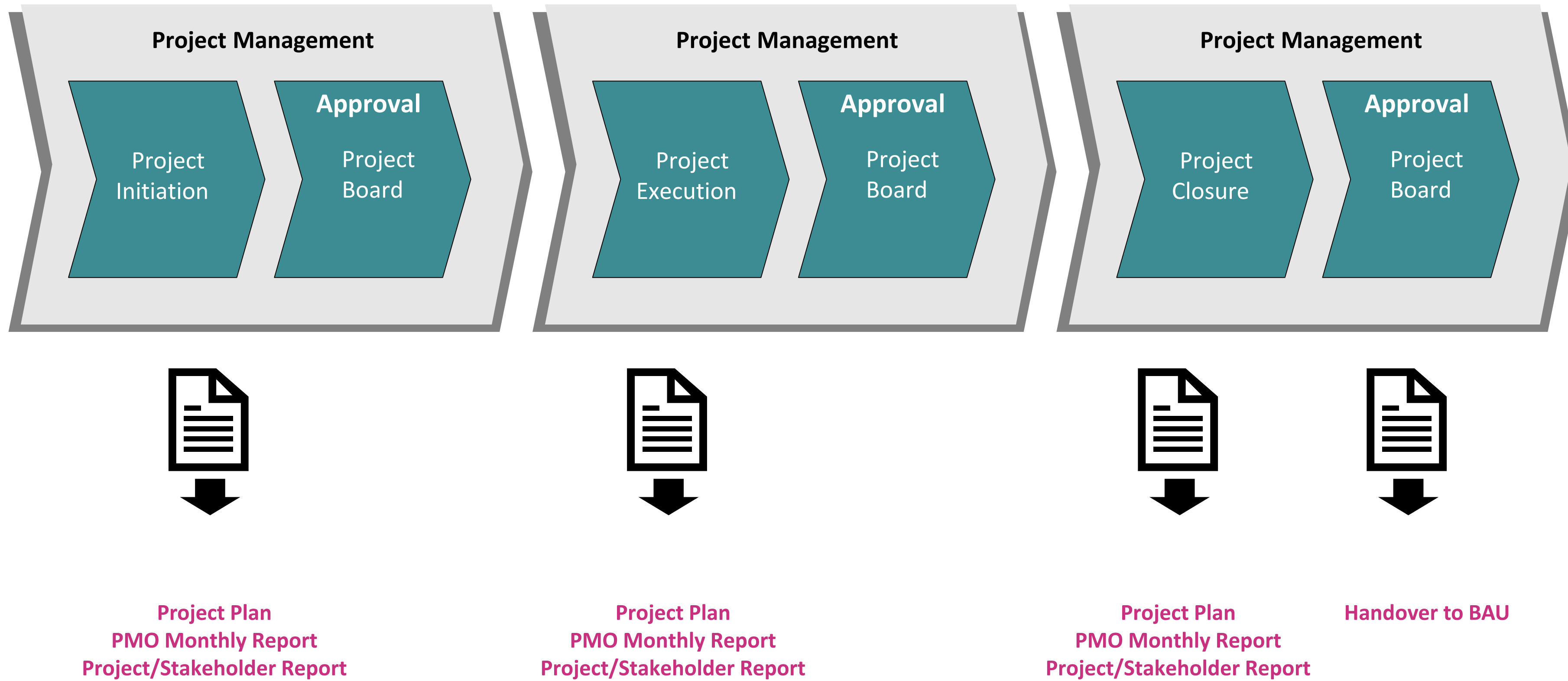- How to delegate

STANDARDISING WHAT YOU DO

The project lifecycle is 'process-ised' but often activities within the lifecycle don't have a process guide or checklist
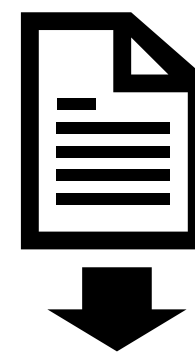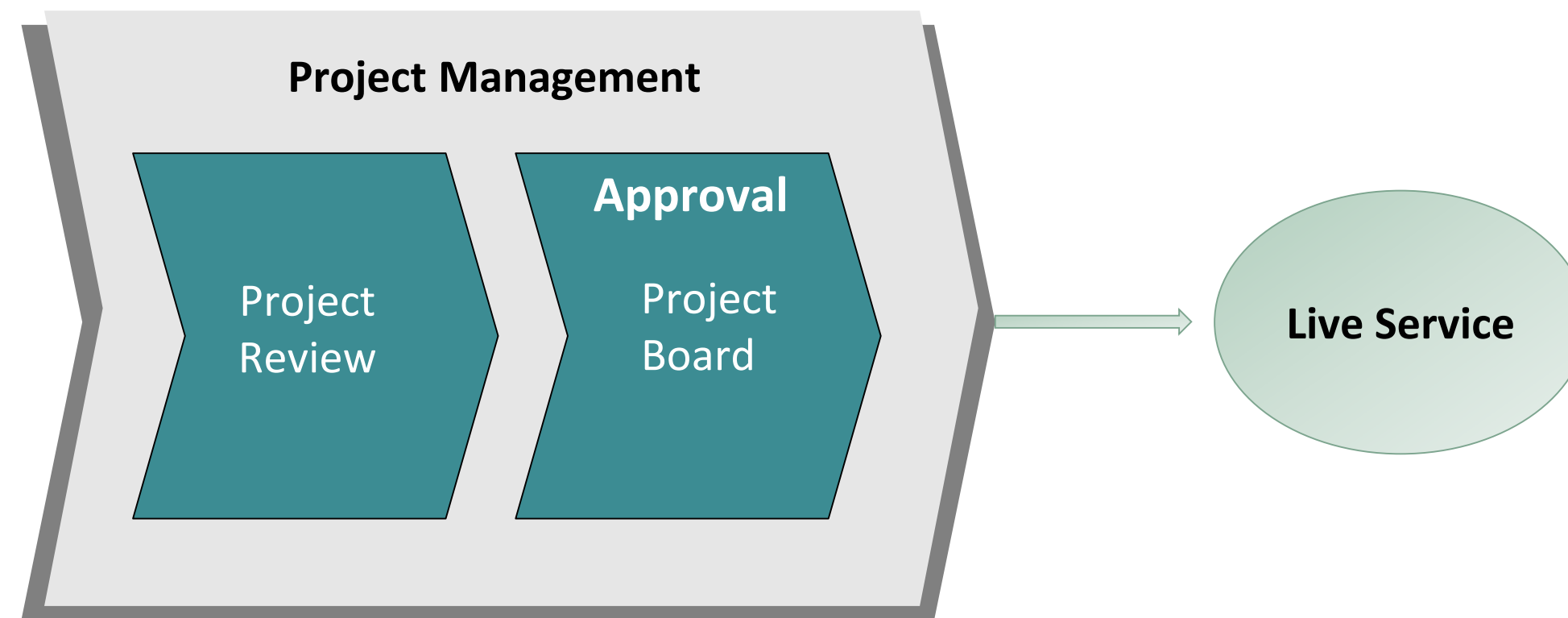
Governance Process – Idea to Initiation

Local Idea

Central Idea

Initial discussion with OD

Template: Full Business Case

Estimated Costs Business Case

Approval	**Approval**
PMO Review (PMO & BD)	Project Review Team Meeting (Op's & Projects)

Template: Concept Business Case

Concept Business Case

Approval	**Approval**
PMO Review (PMO & BD)	Project Review Team Meeting (Op's & Projects)

Projects over £1M OR out to tender?

Yes

No

Template: Full Business Case & Executive Summary

Full Business Case Development
Negotiate Contracts

Approval	**Approval**	**Approval**
Stakeholder Review (Subject Matter Experts)	PMO Review (PMO & BD)	Project Review Team Meeting (Op's & Projects)

Tender

ExCo & Board Review

Approval	**Approval**
ExCo Review	Board Review

>£1m

Sign Contracts / Project Initiation

Governance Process – Initiation to Closure

Governance Process – Closure to Closed

Project Management

Project Review

Approval

Project Board

Live Service

Lessons Learned
Benefits Review
PMO Project Review

BUT...

THAT DOESN'T HELP ME
DAY TO DAY

WHEN YOU ARE DOING SOMETHING OFTEN...

...make it as easy as possible to do it consistently well, every time.

(even for packing)

- 30 October 1935
- Boeing 299
- 5 experienced crew
- 2 died
- Cause: 'pilot error'
- The plane was 'too complex to fly'

5 PROCESS EXAMPLES

Risk

- Identify risk
- Log risk in register
- Assess risk
- Take decision on risk response
- Make action plan
- Do action plan
- Monitor regularly
- Close risk

01

Issues

- Identify issue
- Log issue in register
- Assess issue impact
- Establish options
- Propose recommendation
- Make decision on next steps
- Make action plan
- Do action plan
- Monitor regularly
- Close issue

02

Change

- Identify change
- Assess change impact
- Establish options e.g. do/postpone/don't do
- Decide on recommendation
- Fill in change form and send to PMO
- Get decision on next steps from sponsor
- Make action plan
- Do action plan and put tasks in project action tracker
- Monitor regularly
- Close change

03

Meetings

- Agree purpose
- Agree attendees
- Book meeting room
- Book refreshments
- Write agenda
- Send invite and agenda
- Check acceptances and reschedule if necessary
- Host meeting
- Write minutes
- Send minutes
- File minutes
- Follow up actions and put actions on action tracker

04

Reporting

- Establish report purpose
- Establish report audience
- Collect input
- Write report
- Get sponsor to approve report before distribution
- Distribute report and copy to PMO
- File report
- Collate feedback
- Action on feedback/follow up actions and put actions in action tracker

05

NONE OF THIS IS NEWS.
BUT HAVING IT WRITTEN DOWN TAKES AWAY THE
THINKING OVERHEAD WHEN YOU'RE STRESSED
OR JUGGLING A LOT

Read next: The Checklist Manifesto by Atul Gawande

Checklist to the rescue

- A group of pilots created a checklist

- The model 299 flew 18 million miles without incident

- Not too complex to fly

- Just too complex to remember everything under pressure

PRO TIP

TEST YOUR CHECKLIST!

DELEGATING

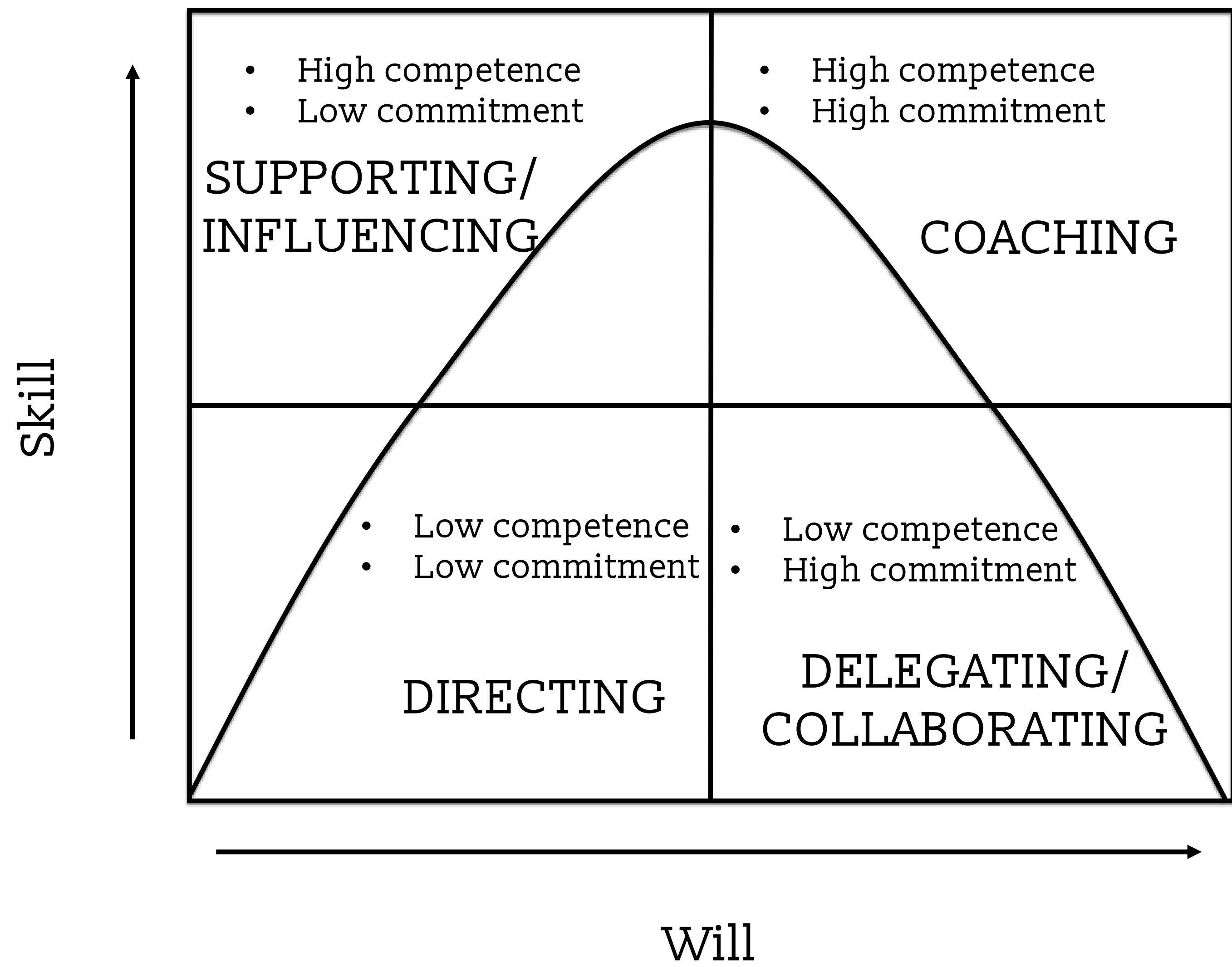How to get other people to do tasks and not be disappointed

THE DELEGATING PROCESS

1. Assess competence and willingness

2. Explain the work

3. Create an environment for success

4. Check understanding

5. Monitor and follow up

Assess skill and will

01

Explain the work

- Ask for what you want achieved

OR

- Ask for what you want done

- In the first case, you don't specify how they will arrive at the end result. In the second, you are very specific about how you want the work done.
- You might need to specify both to get a specific outcome done the exact way you like it

02

Create environment for success

- Provide relevant resources
- Provide relevant support
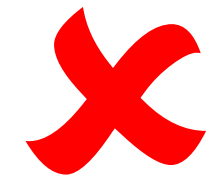- Give the delegate what they need to be successful

03

Check understanding

- Do they actually know what to do?
- Don't ask them, as they might not feel able to say no
- Instead, say: "What are you going to do next/first?"

04

Monitor and follow up

05

	Let's do it together	I'm here if you need me
I'll ask if I need help	✗	✓
Sit with me	✓	✗

QUESTIONS?

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