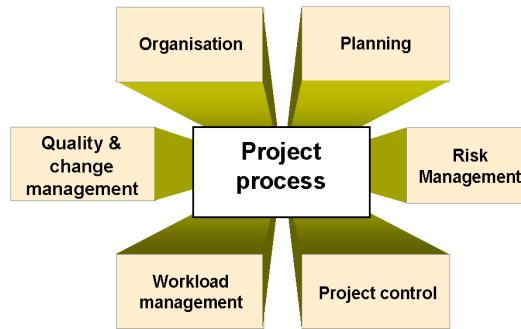


# PHARMAVISION CONSULTING LTD



## Case Study

### Establishing a Project Management Methodology

#### Client Background

The client is a recently-established company specialising in the application of economics to health care. The directors and staff very quickly found themselves to be victims of their own success, as workload was very high, and they were usually having to work very long hours to meet deadlines. Many projects involved delegating elements of work to a network of European consultancies, and to academic centres, and there were many problems in managing these subcontractors, mainly in meeting deadlines.

The customers comprise a wide range of medical technology companies. Types of project range from one-off literature reviews on economic evaluation, to data mining and major prospective outcomes studies.

#### Objectives

- To improve project pricing accuracy by tracking the cost of carrying out each project.
- To enable better planning by scheduling each new project realistically.
- To improve subcontractor management by setting up clearer plans and agreements.

#### Action Plan

Although some of the directors had received some relevant training before, it was agreed that everyone should be brought to a common standard by means of a short course covering project management basics. Les Rose of Pharmavision Consulting delivered this as short modules, to minimise disruption of work flow. There were initially three such modules, each of 3-4 hours, concluding with an action planning session. The output from this session was a project plan for implementing the actions, each of which was designed to address objectives as set out above.

## **Mentoring**

One key action was to appoint a dedicated project planner. Les Rose acted as her mentor, via one-to-one meetings, email, and telephone. The outputs from these sessions were:

- A set of standard operating procedures (SOPs) for contract set-up and project management.
- Project planning templates for all types of client contract. These were set up in the project planning software system.
- Formats for time sheets and progress reporting forms. These completed and transferred electronically.

## **Initial Outcome**

One of the more challenging practices to set up is usually getting staff to complete time sheets. In this case, it was among the first to be implemented, and was very successful. Quite rapidly, real information on the biggest cost, staff time, was being collected and reported to the directors, enabling considerable refinement of quotations for new work. However using Microsoft Project as the vehicle was not so successful, as it was found difficult to use for the intended purpose. Instead data were entered into Excel.

Scheduling workload proved a more difficult nut to crack. One of the key problems was that projects were being carried out outside the control of the project planner, ie not entered into the planning system. The company was attracting so much work that directors were committing to contracts without up to date information on resourcing. The company continued to perform extremely well, but at the expense of an escalating workload and worsening stress levels.

## **Review and Action Plan Update**

The time arrived for a pre-planned review. By this time, 18 months later, there were more new staff, so the directors requested a short (half day) training update. This included a simple approach to project planning, by breaking down every new proposal into its constituent deliverables. After this was completed, there was a further action planning session. The key issue was scheduling workload. The directors agreed that one of their number would act as implementation manager. Close monitoring of this proved that it was not working. The directors then agreed that they were probably not the best people, as they were always far too busy running the company and providing key scientific input. They then appointed a staff member - a new person with experience of project scheduling.

## **Success!**

Within a few weeks a new approach was achieving results. A simplified project scheduling system was set up in Excel, which was updated and indeed driven by timesheet data. The new system manager, still supported by the project planner, was in control of all projects and exercised the necessary discipline. All new projects were being planned as lists of interconnected deliverables, using the technique taught by Les Rose. The benefits to the company, and its clients, from these relatively simple measures included:

- Much more reliable project planning and scheduling - when they promise a date they can keep to it.
- Easier negotiation with subcontractors as they concentrate on discussing outputs not time spent.
- Cost-effective quotations - based on real experience not on guesswork.
- Lower stress levels and therefore better quality work.

## **The Bottom Line**

The company's growth continues unabated, with improved profitability. Investment in training and consultancy time from Les Rose has so far been five days. The directors consider this equation very cost-effective!

## **Next Steps....**

Workload planning at the corporate level is working well. This now needs to be translated into the individual planning level, often described as time management. Indeed, Pharmavision Consulting already provides training in workload planning and prioritisation at both top and bottom levels. The important aspect of this is the linkage with scheduling, so that the 'real life' world of changing priorities can be managed.

## ***SUMMARY.....***

### **Key Problems and Needs**

- Deadlines were usually achieved but with far too much effort
- Quality standards were achieved but again with great effort
- People were overloaded
- No rules for priorities and project scheduling

### **Approaches Used**

- Modular training
- Mentoring on-site
- Email and telephone follow-up
- Supply of skeleton documents for customisation

### **Deliverables**

- SOPs for project management
- Project planning templates
- Action plan for implementation

### **Key Outcomes**

- True cost of staff effort now known via full use of time sheets.
- Much more accurate estimating for new projects
- Good control of the time plan for each project, with better compliance with deadlines

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