

Managing Marketing Projects A practical viewpoint

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Defining the project

Project management can encompass everything from major infrastructure development to planning the company Christmas party and everything in between! Even restricted to marketing, it covers a wide range of potential applications that can have profound effects on the entire organisation.

Project management is never pure, and rarely simple - or at least not as simple as many would like to believe and this is one of the main reasons why so many problems arise over timing, cost and failure to deliver desired outcomes. It is strongly argued that the project concept must first fit the overall organisational strategies, then culture, structure, expertise and resources must be matched quite specifically to the project at an appropriate level. Otherwise, the outcomes are invariably less than ideal. Naturally, the more complex the project and the larger the number of stakeholders, the greater will be the risk.

The purpose of this paper is to stimulate thought on various aspects of planning and management of marketing projects..

Project relativity to the business plan

For each significant project it should be standard practice for management to expect some kind of formal business plan containing an overview of how the proposed project outcomes fit the organisation's goals, objectives, market characteristics and strategies,

This document should not contain excessive detail about implementation techniques, but it should certainly set out the value propositions, causes, effects, resource requirements and payback scenarios with sufficient clarity that management may "sign off" on the plan, as a precondition to moving to the next stage.

The Scope of Work

It is common for this term to be applied to *external submissions* to provide a basis for accountability of suppliers. However, where the work is to be done within the organisation, the term *action plan* is frequently substituted. Actually, there seems to be every reason for applying the same criteria, regardless of who will do the work, because in this

way, issues of accountability will become far more explicit, right from the start.

The old corporate adage "no surprises" needs to be applied consistently. Opportunities to "hide" mistakes or poor judgement need to be resisted by reference to defined criteria. The Scope of Work should set clear expectations for all key aspects of the project.

Goals & objectives

A common belief that goals and objectives are interchangeable terms is wrong. The goals should be high-level statements defining the overall context, to be achieved through the application of one or more projects. .

The goals should define the benefits in terms of *outcomes for stakeholders*. If this cannot be done, the related project is probably not worth the investment.

Conversely, objectives are specific statements of

"Time spent on reconnaissance is rarely wasted"

SAS Training manual

- Canvas the views of all key stakeholders to identify probable reactions, levels of support, roadblocks and where to apply caveats.
- Work through all probable "cause & effect" scenarios, so that unanticipated surprises are minimised.
- Set up clear expectations for the project deliverables & maintain these as a "baseline"

what the project will achieve. They must be quantified, realistic and relate directly to the deliverables.

Preparing a Scope of Work

A detailed Scope of Work will include the following:

- A simple definition of what the project is intended to achieve
- A short review of the business plan elements that directly affect outcomes

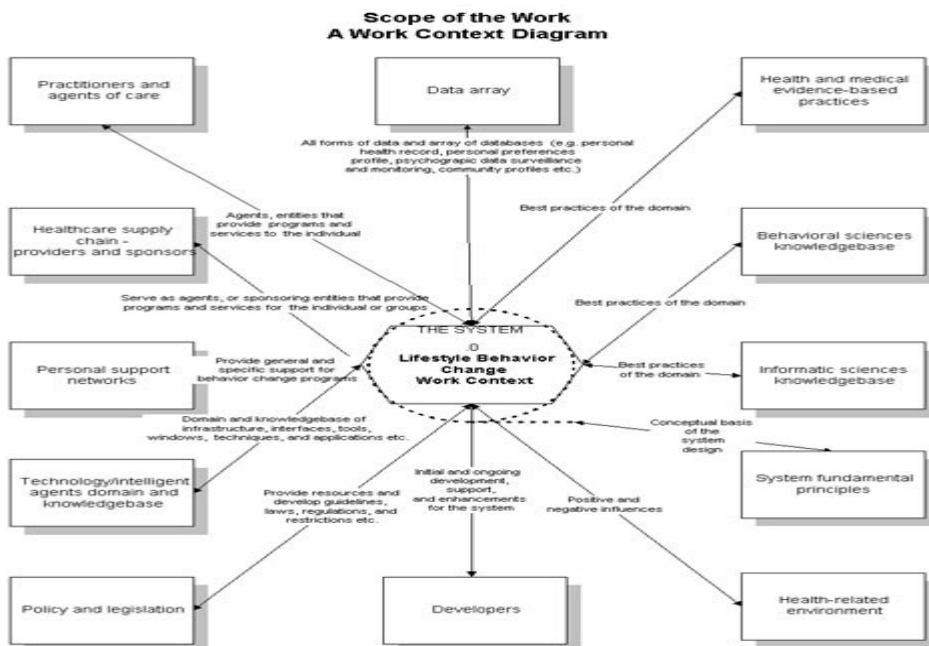
- A statement of caveats defining any issues of company culture, management, resources, accountability etc that will cause the project to be conducted in any particular manner, likely to affect the outcomes.
- Definitions of stakeholders in the context of the specific project. These must address the relative importance and relationship of each stakeholder to others and to the project, with anticipated reactions to its various attributes.
- Resource issues, including production, outsourcing, funding, marketing, sales & distribution issues.
- Timing expectations and an outline of phasing.
- Critical success factors
- Project duration and milestones
- Cost and payback budgets for successive stages of the project

This is the time to identify and resolve any vested interests, "sacred cows" or other constraints imposed by funding, personnel, production capacity, segment experience, supply-chain and so on. It will be far better to tackle these issues now than to accept responsibility for a project that may be fundamentally flawed from the start. However, this is fraught with political danger and may require considerable diplomacy and management skill to resolve. A plea of insanity or terminal illness may be the best option!

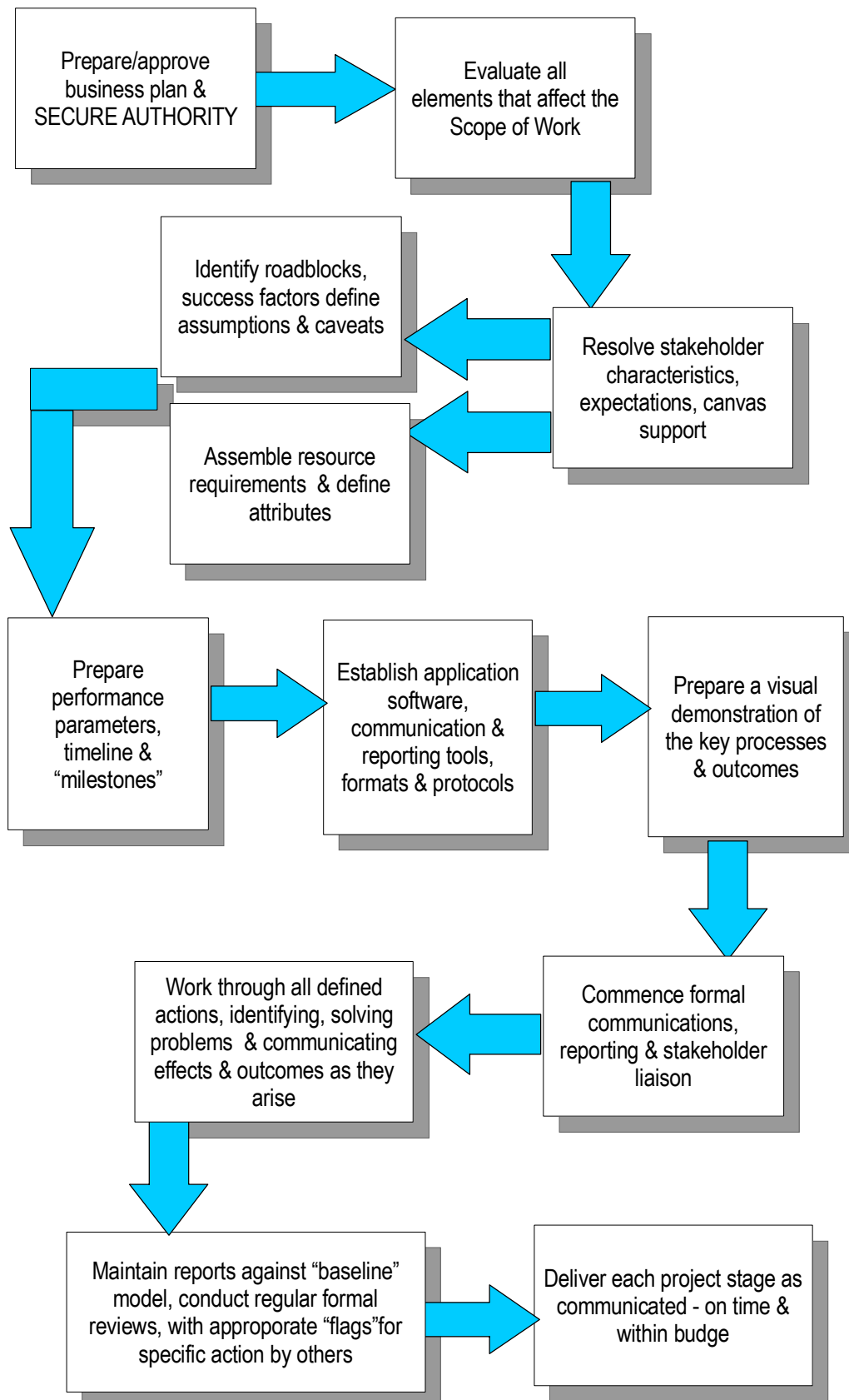
When all of the key issues have been resolved, the Scope of Work must be debated with management and formal agreement provided, along with budget approval and authority.

The Scope of Work should not be allowed to become a project in its own right. If the groundwork was laid effectively at the initial evaluation and business planning stages, the process should be accomplished within a time frame ranging from a few days to a few weeks, but rarely longer. If management has "blessed" the business plan, there will be an expectation of prompt development of the detail. (See below).

The importance of realistic evaluation of "causes and effects" for ALL stakeholders right across the organisation's value chain cannot be overstated. One out of several stakeholder groups may not have the power of approval, but may certainly create significant roadblocks



Flowchart illustrating the Project Management processes



The implementation process

The following has been compiled from a combination of sources, including “TenStep Project Management Process®” and other leading PM training resources, as well as our own practical experiences.:

1.	The goals, strategies, general methodology, timeline and budget affecting the project MUST be defined and approved IN ADVANCE by organisation management, with suitable caveats and review points.
2.	The project management process must be realistic, flexible and scalable, relative to the degree of complexity of the project and to the time and resource allocation.
3.	The process must be capable of identifying and managing all aspects likely to affect the outcomes, including the scope, risk, issues, quality, etc.
4.	Projects must be managed proactively, regardless of the size.
5.	Processes must be established, communicated and agreed IN ADVANCE by the project team and any stakeholders known to directly affect the project outcomes.
6.	The Project Manager MUST be given appropriate authority to support the allocated level of responsibility. No project manager can accept responsibility for the delivery of the project when they cannot make key decisions needed to manage it.

The timeline

Gaining agreement on the project timing is as critical as on objectives, deliverables, scope, risk, cost, approach, etc.

Aggressive and/or unrealistic deadlines are fundamentally problematic. They place unrealistic pressures on the project and can lead to shortcuts, failures to assess the relevance of problems and opportunities, as well as forcing the pace of technical or production support.

On the other hand, there is little excuse for excessive delays or deferrals. Early indications of this will send negative signals to many stakeholders with potentially adverse effects on their cooperation, or on their perceptions of the efficiency of the project management team.

A significant element that will affect the timeline is the evaluation and marshalling of resources. Consulted at an appropriate time ahead of the required actions, explanation of the reasons and outcomes will go a long way to gaining the support and cooperation of colleagues, especially in production or technical areas where set-up or changes to other schedules are involved.

The planning process itself takes time, as does the communication and gaining of approvals, so it is essential to allow for these key elements.

A timeline should be clearly structured with care to balance the major decisions/milestones along with the detail required to ensure the success of the former. Excessive detail is as inappropriate as “broad-brush” assumptions.

Working tools

While there are no firm rules for the planning and recording of project stages, ultimately the requirement will be as follows:

- Facility for recording and manipulating factual and timely information
- Simple, preferably visual flags for the critical dates and/or processes
- Extraction of sub-sets of information
- Ease of reporting in a professional and concise manner to the various stakeholders.

Even quite large projects can be managed using Excel, a relational database or a project management tool like MS Project. More critical than investing in “whiz-bang” technology, the fundamental principles of information-management must be met, as follows:

- Clear project goals
- Agreed strategies
- A “one-time-write” process of recording and editing information
- Functionality to manipulate the information into appropriate formats for communication
- Appropriate infrastructure/IT applications so that all stakeholders have access to the relevant information as the project team deems suitable.

(Further suggested reading – “Knowledge Management – a Practitioner’s view”)

“People” issues

Putting together an internal team of experienced internal personnel may seem the most cost-efficient method. After all, this is likely to encompass a range of stakeholders who know the market, the resource capabilities and expectations of management. However, while this approach is inherently sound, there will inevitably be a hierarchy where the opinions of some are (if not by intentionally) more likely to prevail than ideas from those lower on the “pecking order.”

It highlights the absolute necessity for objectivity and proven methodology, as well as the ability to identify and accommodate causes and effects relative to stakeholders right across the value chain.

Usually, a committee is appointed under a “qualified” chairperson who is, unfortunately, not always the one with the skill or the “clout” to overcome vested interests, or mere intransigence. Conversely, if the CEO is the chairperson, will the other members be prepared to adopt an openly contrary view, however valid the logic?

The answer lies, of course, in establishing the parameters against which the concept must be measured, the outcome being a “pass,” “fail” or “amend & resubmit.” This process tends to show up illogical or inappropriate arguments for what they are.

if the concept gets past the preliminary evaluation stages the next “people” issue will be the selection of the project manager and/or development group. All of the same arguments raised above will reoccur, so the same logical process must be established. However, the project management credentials are even more critical. Being the boss’s niece or the ability to run project management software are not substitutes for fundamental competence, skill and experience.

Communication

There is a fundamental difference between “product” selling and “concept” selling and some individuals will always be more comfortable with the former. Even if the final outcome is a new product, until it has actually been produced, it remains a concept.

Therefore, a “proof of concept” pilot may be essential before colleagues are “sold” on cooperation, or management is prepared to sign off on significant resource allocation. Although conducted on a “pilot” scale, many of the elements of the total project may need to be replicated, at least to a stage where the key project deliverables can be demonstrated. Sometimes, this may require physical models or prototypes, especially if new manufacturing processes are involved. However, computer simulation is a relatively inexpensive and highly effective way of “modelling products and processes.

The tools at the disposal of today’s project manager are formidable and there is little excuse for not applying them in an appropriate manner. Computer modelling, VRML in the hands of experts will bring a concept to life and allow even the most recalcitrant stakeholder to visualise the results. However, a word of warning – the “expert” at the computer keyboard will need highly specific guidance regarding what to present, in what sequence and to what level of sophistication. This stage is a project in its own right!

Demonstration is an absolute necessity at some stage of every project. In our experience, few individuals are capable of making the mental adjustment from concept to realisation and this seems to apply across most industries. The delivery techniques may be identical, but if the content/images or the product/service used as

examples are not fairly close to the actual project application, there may be inevitable difficulties in gaining understanding of how the proposed methodology relates.

In a sales training session many years ago given by Bill Beatie (formerly Reckitt & Coleman & S C Johnson), the sales team was invited to consider a lost sale and whether it was the buyer who “failed” to understand the features and benefits, OR the salesperson who “failed” to communicate them effectively?

In a recent example where international management was to receive presentations from the local team, we had immense trouble persuading the local CEO to depart from the former practice of overhead projector foils. Happily, we prevailed and the team made reasonably professional and valid presentations, even though they were scaled down to absolute essentials (no fades, pop-ups or other effects).

In another example, we were forced to use material from another industry to demonstrate a range of information management techniques. (Extracting data from the company server, creating object libraries, publishing templates and user-defined information formats).

These techniques are now fairly simple processes and it should have been easy to see how sets of information from different industries were essentially similar. While the demonstration achieved local project approval, it failed to secure support from the (overseas) head office personnel, who could or would not see how the demonstration applied to their particular category. The conclusions are obvious – demonstrate, but be sure the context is entirely appropriate.

As in most things, judgment is needed to decide what is “appropriate.” The cost and use of resources needs to be weighed against the value of the project outcomes, the level of risk and the probable reactions of the stakeholders.

More about Stakeholders

As implied above, we challenge any view that stakeholders are solely from within the organisation. Certainly, management, employees, administrators, purchasing, logistics, customer-service, IT and accounting personnel will be affected to some extent by some aspects of a new project . If they are not consulted, the project manager has only himself to blame if (or rather when) some important function fails to meet expectations.

There are few projects that do not also have external stakeholders. They can be the greatest challenge, but also the most useful alliances if treated with professional courtesy. For example, a supplier can provide innovative solutions that will enhance a key value proposition, reduce costs, shorten delivery time or maybe just make life easier due to their professional service.

No consideration of Stakeholders can be valid unless it includes the end users. Regardless of marketing and distribution methods, there is usually an end-customer. Understanding the aspirations and motivations of these users can make or break the outcomes.

A classic example of this occurred in the “dot-com” boom days when “innovators” developed (often literally) fantastic solutions to problems that largely did not exist. The technology was supposed to eliminate errors, speed up otherwise mechanical processes, alleviate boredom and repetition and so on. Sure, some innovations succeeded because they were perceived by users to do these things. Others may have convinced investors but unfortunately, not the users who were supposed to take up the solution in vast numbers.

Detailed planning

All of the above essentially covers background or general issues without which serious problems are likely to arise at some stage of the project. These must, however, be supported by the specific activities related to every detailed stage of the process.

The need for ability to manage a number of simultaneous project elements increases with the complexity of the overall project. An unresolved problem at one point may have potentially serious consequences at another

In many cases, these issues need to be worked in parallel, relating the effect of one decision to the inputs of another. This is often easier than it first sounds, using the time-honoured practice of breaking large problems into component parts..

Care should be taken to adjust for conditions that may change over time. Good stakeholder relationships will help to overcome this, through advance knowledge of probable causes that will affect the project outcomes.

Another form of “future-proofing” a project is to be entirely open about *unknown* factors. We sometimes create surprise with clients by stating that at the outset of a project, we “don’t know what we don’t know.” However, we explain that the *process* will identify such issues early in the project, so they can be dealt with in an appropriate manner. Unless perceived to be mission-critical, this approach is reasonable. If they are critical, then the objectives were probably unrealistic, or the value propositions undeliverable.

As long as intangibles are recognised and reasonable assumptions shared with management, the potential for unpleasant surprises will be minimised. The worst any project manager can do is to *assume* that some vaguely anticipated problem will either not occur, or will resolve itself. Better to identify the potential roadblock, explain its context and level of importance, canvas input and guidance early.

Anyone who claims to be able to foresee all of the problems in advance and have solutions readily available is either a fool or a liar (or both). If in doubt, the track record of the project manager will be the most useful guide. Having a doctorate in Toad-Sexing (to borrow a phrase from a former colleague) may not be the ideal qualification for an industrial marketing project!

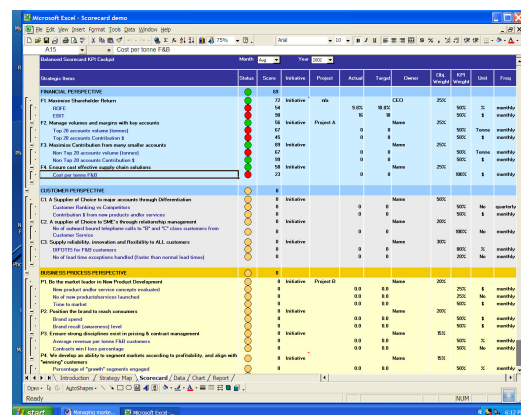
Breakdown structures & network diagrams

Whole books have been written about each of these stages of project planning. Inevitably, many of these processes fall into “work creation” mode, even if the underlying concepts are valid.

We advocate laying down a “tree structure” of actions where sub-activities are related to higher-level actions. Any efficient project management application tools will usually have facilities to show these links, sets and sub-sets without having to develop such stages manually.

The only purpose (but a good one) of these diagrams is to provide visual reference to work sequences. The best tools have “traffic light” or similar functions that literally highlight completed tasks and their effect upon other tasks and stages.

Linking resource allocation is also valid at this stage of planning. In this way, the activity map becomes fully dynamic, meaning that an activity cannot be completed without the appropriate allocation of resources. Naturally, this applies to funding, production capacity, as well as to people.



A visual “traffic-light” reporting system for work-plan management, developed in Excel

Measuring outcomes

The difficulties of differentiating between achievement and activity are well known.. It is essential to establish clear, measurable performance expectations and link the achievement directly to them. Even with relatively intangible elements, it will be possible to define some explicit pass/fail criteria at worst, or a benchmark standard for variance assessment, at best.

Milestones

The project will have been approved on the basis of specific milestones being met by defined dates and

within defined terms. (If not, the approval processes were flawed from the outset).

Maintaining a baseline version of the work plan is essential. Over the life of the project, there will be inevitable changes to many aspects and it is prudent to be able to reference progress both to the original criteria, as well as to subsequent versions. At the very least, this affords some protection from criticism when there is a clear understanding of the degree of drift *and the reasons*.

Reporting

A frequent criticism of project managers is that they provide too much, or too little information.

We favour the technique of “drill down” reporting based upon a hierarchy of information, with appropriate access levels, preferably on an Intranet/Extranet portal. Using this technique, the project team decides what to show and when, controlling the information as for any other element of the project. Stakeholders may access information relevant to their defined access level. Extra detail is available relative to authorisation, but care should be taken to flag critical updates so they do not escape attention..

With the reporting protocol communicated clearly to all stakeholders from the outset, the onus of reading the reports is effectively transferred to the stakeholder.

Regular review meetings are strongly recommended, where status should be *demonstrated*. Meetings should be formal, with an agenda, and detailed recording of decisions and other developments.

Conclusions

No process guarantees success, but the application of logic, structure, with appropriate resources, clearly-defined authority, adequate time and clear communication will most certainly enhance the prospect of delivering a project on time and within budget