



# PM CONNECT

A quarterly newsletter that brings information on modern project management methods, practices and tools

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## News from PM4DEV

**360° Learning Program®** is our learning framework that provides a holistic environment to build the skills of project management. Using a blended approach to training and learning, the program takes participants through a series of learning opportunities all designed to provide a wide range of different learning environments.

The program offers a mix of e-Learning, classroom learning, communities of practice and remote coaching to build not only the required skills but a sustainable practice of learning. We know that one time courses are not enough and that with time the skills that are not put into practice are soon forgotten.

Our program goes beyond the typical training and de-

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## 1. The Project Charter

The Project Charter is a communication tool that provides a high level information about the project. It is usually developed once the project has been approved by the donor and its use is mostly internal to the organization.

The charter identifies who is the project manager, the purpose of the projects, its objectives, scope, constraints, assumptions, risks and deliverables. These headings are commonly found in terms-of-reference and project contract documents.

When initiating a project it is important that all parties involved agree in considerable detail what the project is to achieve before it starts. Failure to gain formal agreement almost always leads to some expectations not being met.

The nice thing about the Project Charter is it provides a quick way of delivering all the important project information to stakeholders, without having to complete a full Project Document. It's a lot more digestible for busy stakeholders who may not have time to



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## 2. Email Etiquette Tips

Here are some simple rules of email etiquette you can follow in order to make sure your emails will be warmly and productively received.

1. Check your organization's email policy is. Many organizations have rules about the types of message that can be sent and also if your email is monitored or screened.
2. Make sure your e-mail includes a courteous greeting and closing. Helps to make your e-mail not seem demanding or terse.
3. Address your contact with the appropriate level of formality and make sure you spelled their name correctly.
4. Spell check - emails with typos are simply not taken as seriously.
5. Read your email out loud to ensure the tone is that which you desire. Try to avoid relying on formatting for emphasis; rather choose the words that reflect your meaning instead.
6. Be sure you are including all relevant details or

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*... the project charter , from page 1*

wade through a lengthy document, when looking for a quick, but detailed overview of the project. Most Project Charters contain the following information:

- **Background** Provide background information that includes the reasons for creating the project and mentions the key stakeholders who will benefit from the project result.
- **Objectives** Describe the project goals and link each of them with related, SMART project objectives.
- **Scope** Provide a high-level description of the features and functions that characterize the product, service, or result the project is meant to deliver.
- **Schedule** Provide a high-level schedule of the start and end of the project including significant milestones
- **Constraints** Identify the specific constraints or restrictions that limit or place conditions on the project, especially those associated with project scope.
- **Assumptions** Specify all factors that are, for planning purposes, considered to be true. During the planning process these assumptions will be validated.
- **Risks** Outline the risks identified at the start of the project. Include a quick assessment of the significance of each risk and how to address them.
- **Deliverables** Define the key deliverables that the project is required to produce in order to achieve the stated objectives.

*...email etiquette , from page 1*

information necessary to understand your request or point of view.

7. Refrain from using the Reply to All feature to give your opinion to those who may not be interested. In most cases replying to the Sender alone is your best course of action.
8. Type in complete sentences. To type random phrases or cryptic thoughts does not lend to clear communication.
9. Always acknowledge emails from those you know in a timely manner.
10. Be sure the Subject: field accurately reflects the content of your email.
11. Keep emails brief and to the point.
12. Always end your emails with "Thank you," "Sincerely," "Best regards"
13. Avoid unnecessarily large file sizes. Digital photos especially, learn how to resize your digital photographs.
14. Don't type in CAPITALS as this is considered to be SHOUTING. This is one of the rudest things you can do.
15. Use BCCs (Blind Carbon Copies) when addressing a message to a group of people who don't necessarily know each other.
16. Don't write anything you wouldn't say in public.
17. Be Professional, stay away from abbreviations and don't use emoticons (the little smiley faces).
18. Ask Before You Send an Attachment: Because of large size attachments or computer viruses, many people won't open attachments unless they know the sender, ask the recipient first.
19. Think before you forward! Get the sender's permission first.
20. Don't send confidential or secret information through email. Email messages are more like postcards than sealed letters; they pass through many computers to get to their destination.



### 3. P.E.S.T. Analysis

PEST analysis is a strategic planning tool used to evaluate the impact of political, economic, social, and technological factors might have on a project. It involves an organization careful consideration to the external environment before starting a new project. PEST analysis stands for "Political, Economic, Social, and Technological analysis" and describes a framework of macro-environmental factors used in the environmental scanning component of strategic management.

The model has recently been further extended to adding Environmental and Demographic factors. It is a part of the external analysis when conducting a strategic analysis or research, and gives an overview of the different macro environmental factors that the project has to take into consideration. It is a useful strategic tool for understanding external environment where the project will be implemented.

#### Composition

- **Political** factors include areas such as tax policy, labor law, environmental law, trade restrictions, tariffs, and political stability. Political factors may also include the type of goods and services which the government does not want to be provided by the project. Other factors include the political forces that exist in the project area and the level of democracy, participation and other human rights.
- **Economic** factors include economic growth, interest rates, exchange rates and the infla-

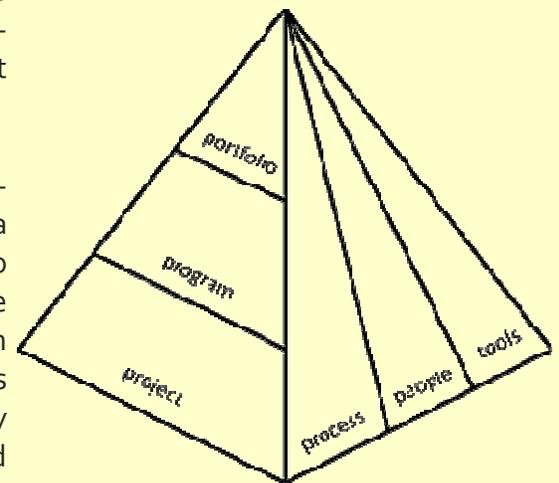
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### 4. The Portfolio, Program, Project Framework

At any given time, a development organization is running several projects funded by different donors. In small organizations projects are often handled on a first-come-first-served basis or based on who makes the most noise.

As development organizations grow, there comes a point where it becomes necessary to prioritize and manage the range of projects from a strategic viewpoint. Otherwise, they face challenges due to the needs to provide the adequate support and resources to all the projects and make strategic decision about their priorities. In other cases the organization needs to evaluate if a proposed project is aligned with the organization's strategy, mission and vision, not making those decisions can lead to many projects that do not receive the appropriate resources or supervision and projects that do not contribute to the long term development goals of the organization.

Organizations can benefit from a Project Program Portfolio Framework that helps structure how decisions are made. There is often confusion when it comes to defining projects, programs and portfolios. Sometimes a program is called a project and sometimes a project is called a program. Sometimes project portfolio and program are mistakenly used interchangeably. These three components require quite different strategies to manage them successfully.



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*....PEST Analysis, from page 3*

tion rate. These factors have major impacts on how projects operate and make decisions. Exchange rates affect the costs of exporting goods and the supply and price of imported goods in an economy.

- **Environmental** factors include ecological and environmental aspects such as weather, climate, and climate change, which may especially affect industries such as ecotourism and farming. Furthermore, growing awareness of the potential impacts of climate change is affecting how organizations operate and the services they offer.
- **Social** factors include the cultural aspects and include health consciousness, population growth rate, age distribution, education levels, work attitudes, crime levels, safety. Projects may change various management strategies to adapt to these social trends.
- **Technological** factors include technological aspects such as access to the internet, communications, education, support and the rate of technological change. They can determine the type of technology the project can use.



The PEST analysis is an important part of the project planning process.

*....PPP Framework, from page 3*

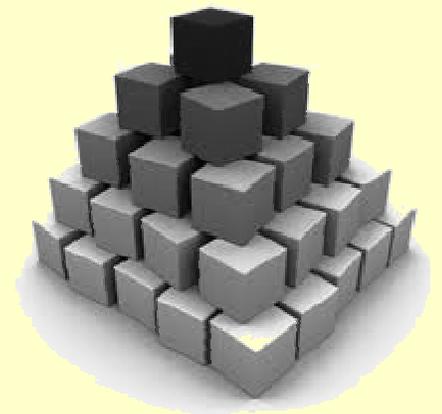
Project Management generally exists in a hierarchy starting with the strategic plan and projects are the vehicle used to execute the strategic initiatives of the organization. Project management is about **"doing the projects right"**

The organization may utilize Programs as a means of grouping related projects together thus ensuring that the interrelationships are managed across them and leveraging economies of scale (i.e. shared administration, management of benefits, etc.). Program Management ensures that the interrelationships are managed to achieve efficiencies and effectiveness of resources across different projects.

Programs and projects can be further grouped together as a portfolio. Portfolio Management focuses on alignment with organizational strategy; setting priorities vs. resource and/or financial constraints; and ensuring the right mix of initiatives to meet organizational goals. This is not unlike the management of a financial portfolio.

Project Portfolio Management is about **"doing the right projects"**, ensuring that only those projects are selected for subsequent inclusion in the project portfolio which will add value to the organization. Also, portfolio management is ongoing and cyclical, while program and project management is temporary.

It's not enough to just manage projects efficiently. It's critical that they be managed effectively within a project portfolio. Effective portfolio management is as critical as effective project management.



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velops a learning environment where participants can learn from different methods. Characteristics of the 360° Learning Program®:

- Online Learning: Access to PM4DEV's learning management system where participants can take our course on Fundamentals of Project Management with the purpose of developing a common understanding and a baseline.
- Face to Face Simulation Course: This onsite course takes participants through all the phases of the project cycle utilizing a simulation approach. Participants will play roles and make decisions based on typical issues in project management, from initiation, planning, to monitoring and closing a project. .
- Community of Practice. Participants will join a community of practice to work on the course assignments, the goal is to build a community among the client organization where participants can share knowledge and build their skills.
- Coaching. Participants will receive personalized coaching from our consultants for a period of 30 days to help them implement the new skills in their day to day activities; this ensures the client organization benefits from the training investment. As part of this component, participants will have access to four one hour webinars on specific areas identified during the assessment.

A key component of our learning program is Action Learning, which involves working on real problems, focusing on learning and actually implementing solutions. It is a form of learning by doing that provides a well-tried method of accelerating learning which enables people to handle difficult situations more effectively.

#### Characteristics of Action Learning:

1. Emphasis on learning by doing
2. Addresses organization issues with project management
3. Conducted in teams
4. Participants tackle issues through creative problem solving
5. Produces tangible outcomes

Action learning stress the collaborative nature of learning by creating a spirit of support in which participants can test out ideas , select the best approaches and develop plans to implement the solutions. To read more about Action Learning, please visit our edocuments page at the following link:[http://www.pm4dev.com/resources/edocs/doc\\_details/40-action-learning.html](http://www.pm4dev.com/resources/edocs/doc_details/40-action-learning.html)

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The points of view provides a summary of themes, that in PM4DEV's experience, have proved critical in the successful implementation of project management methodologies. It draws on the expertise of Project management professionals and provides a guide to deliver a methodology that increases the chances of project success. For more information about PM4DEV services, please contact us via email to [info@pm4dev.com](mailto:info@pm4dev.com)

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