Project Management for Graduate Students

"The Office Move" Case Study

January 2018

Table of Contents

Case Study Exercise 1 – Initial Meeting with the Executive Sponsor

Your first assignment is to prepare for a short Q&A meeting with the Executive Sponsor. This will be your first meeting about the project with the Executive Sponsor.

- Read about the Proposed Project (see below).

- Prepare a prioritized list of 5-7 questions for the Executive Sponsor. Your questions should help you understand the project and the sponsor's expectations so that you can begin writing the project charter.

The Scenario
Congratulations! You have been asked to manage an important campus move that includes the coordination of an office remodeling project and moving staff from two office units into a consolidated space.

The Proposed Moving Project –
Innovative Office Design and Office Move at UW-Madison

UW-Madison has been awarded a $5 million grant for an innovation research project that is scheduled to begin in 6 months. In preparation for this project, your project team is responsible for coordinating the relocation of 78 people into a new work space and for ensuring the office space is move-in ready. The office space needs to be ready for occupancy in 5 months to allow the move to occur during month 6 so everyone is in place for the official kickoff of the $5 million innovation grant. The 78 people are currently located in two different buildings on campus.

The scope of your project includes overseeing the schedules for demolition as well as coordinating the ordering of new furniture/ computers, and the construction. It also includes coordinating the move of the staff into their new space.

The design of the new space includes the use of portable cubicle walls/work spaces, laptop computers, cell phones, and extensive use of electronic storage to maximize the flexibility and mobility of the space as different floorplans/layouts are anticipated throughout the grant research. The university has already contracted the construction work which includes removing some existing internal walls to open up the space, adding flexible electrical connections, and extending wireless access. Based on prior efforts, the estimate for construction is approximately 2 months. A 3-month lead time is required for delivery of the modular furniture.

The remodeling/move project budget is $450,000. The majority of the budget is for remodeling and purchasing of office furniture and laptops. The budget and the estimated schedule are provided on the next page. If the office design is a success, it is anticipated other areas on campus could be converted to a similar design during the next 2-5 years. It is anticipated this design could save considerable dollars and provide additional flexibility for project teams.

Project Milestones

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Design proposal approved Construction contract awarded	Order modular furniture	Begin demolition	Begin construction	Modular office installation	Complete the move

Preliminary Project Budget

	Budget	Estimated Expenses	Actual Expenses			
Project Budget	$450,000					
Demolition/Construction		-$125,000				
Purchase / Install Office Furniture, Computers, Phones, etc.		-$300,000				
Moving		-$5,000				
Contingency	-$20,000					
Anticpated End Balance	$430,000					

4

Case Study Exercise 2 - Identifying the Stakeholders

1) Create a list of possible stakeholders for this project.

   Use the following questions to help you create your list:
   - Who is directly involved with the project?
   - Who is indirectly involved with the project?
   - Who may be affected by the project?
   - Who may be affected by the project's outcome?
   - Who gains or loses from the project's success?
   - Who wants to complete the project successfully and who doesn't?
   - Who is the user of the end result of the project?
   - Who has the authority to influence the project or its outcome?
   - Who has the authority to make the project succeed?
   - Who can make your project fail?

   Stakeholder List:

2) Plot your stakeholders on the grid on the next page.

Stakeholder Classification by Power and Interest
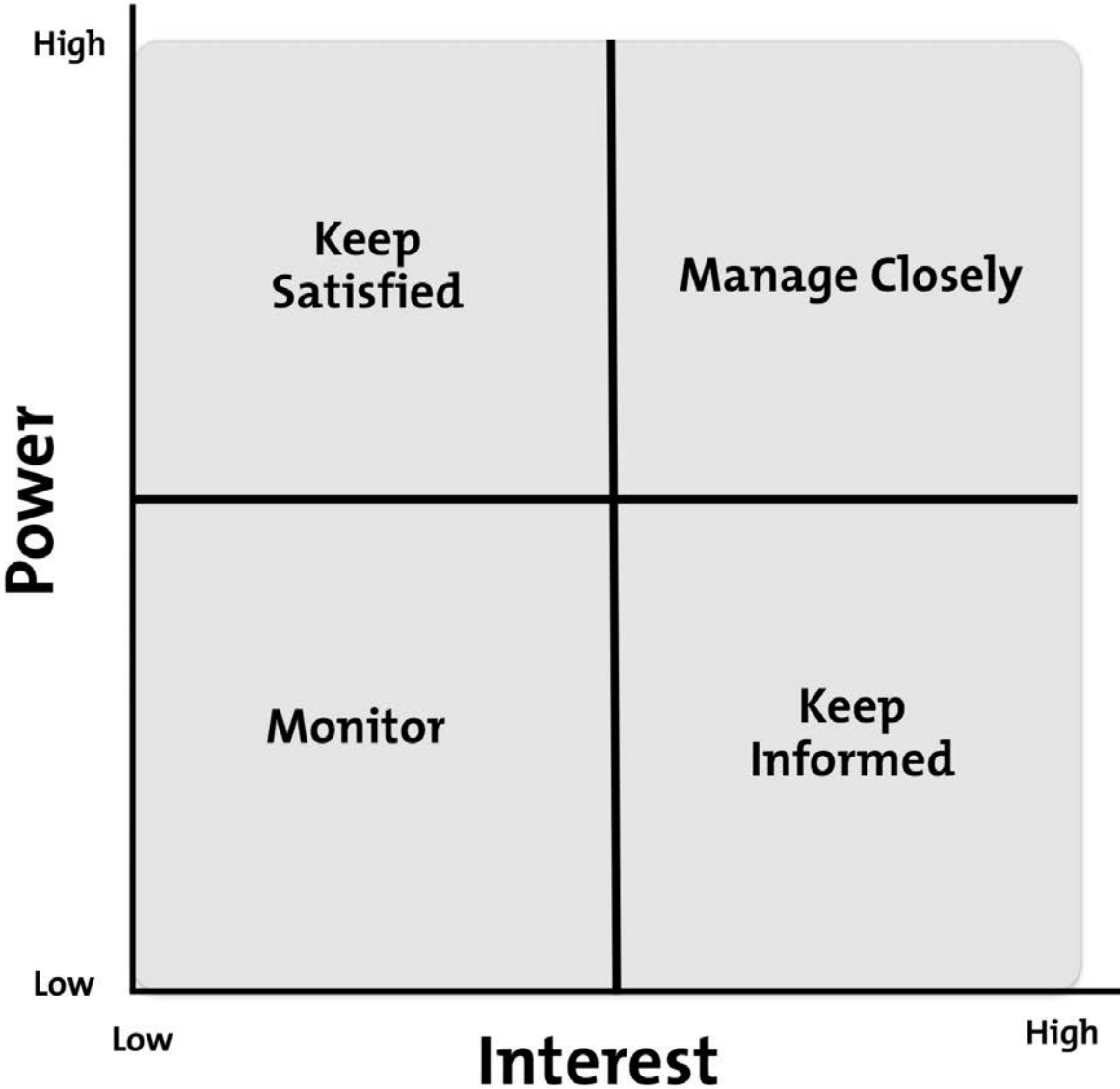
Case Study Exercise 3 - Creating a Project Charter

The decision has been made to initiate the project! Now it is time to draft the project charter.

Using the project charter template and the project information provided, complete your assigned section(s).

Steps:

- o Select a recorder and a presenter
- o Discuss what needs to go into your assigned sections
- o Record the main ideas on your project charter template
- o Prepare to present your portion of the charter to the rest of the class

Project Charter Template

(Office/Department - Project Name)

Updated (date) - Version (x.x)

Project Name	
Executive Sponsor	
Project Manager	
Primary Stakeholder(s)	

Project Description / Statement of Work

Business Case / Statement of Need *(Why is this project important and why is it important now?)*

Customers *(Direct users/Those impacted by the project)*	**Customer Needs / Requirements**

Project Definition	
Project Goals	
Project Scope	
Project Deliverables	

Project Risks *(Actions, events, and situations outside the project plan that may positively or negatively impact the project)*

Implementation Plan / Milestones*) (Due dates and durations)*

Project Budget / Resources *(Money, people, services, materials, etc.)*

Communication Plan *(What needs to be communicated? When is communication needed? To who? How?)*

Change Management / Issue Management *(How decisions will be made? How changes will be made?)*

Project Team Roles and Responsibilities		
Team members	**Roles**	**Responsibilities**

Stakeholder Roles and Responsibilities	
Stakeholders	**Roles and Responsibilities**

Sponsor Sign-off

_____ **Date: _____**

(Name, Role)

Case Study Exercise 4 – Identifying Tasks and Predecessors

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Day 1 Design proposal approved Day 15 Construction contract awarded	Day 1 Order modular furniture		Day 15 Begin construction	Day 1 Modular office installation begins Day 30 Modular office installation ends	Day 1 Moving begins Day 10 Move-in complete

Arrange the following tasks in sequential order showing predecessors and tasks that can occur simultaneously:

Team Instructions: Number the tasks below in order (some may happen concurrently)

- Assign Offices

- Review Design with Construction Contractor

- Order Modular Furniture

- Receive Modular Furniture

- Install Modular Furniture

- Order Phones

- Install Phones

- Order Laptops

- Select Modular Furniture

- Install Laptops

- Begin Move-in

- Begin Construction

Case Study Exercise 5 – Risk Identification, Assessment, and Mitigation

The Scenario
You've planned and scheduled the work for the Office Move Project. Now all you have to do is simply execute the plan and you'll meet your project goal on time and within your budget. Right? Well, maybe not…

Your Task:
1. Brainstorm a list of 3-5 possible risks for the Office Move project (next page).
2. Use the Risk Management template and:
   a. Label and briefly describe the risk
   b. Indicate the probability
   c. Indicate the possible impact
   d. Propose a mitigation plan
3. Prepare to share your risk assessment

Initial Risk Assessment Template

Brainstormed list of possible risks:

   1.
   2.
   3.
   4.
   5.

Risk Description	Probability (High, Med. Low)	Impact (High, Med. Low)	When it might occur	Mitigation Plan (Strategy / who's responsible)

Case Study Exercise 6 – Constructing a Status Report

Team Instructions:

- Identify a key sponsor who will expect to see a status report about the move.

- What are 3-5 important elements that should be communicated?

Case Study Exercise 7 – Managing Scheduling Changes

The following original estimates were received from the designated moving company at the start of this project:

Move Day Scheduling		
Task	**Duration**	**Who**
Pack the contents of the 78 offices into boxes	10 hours (2 days)	Team of 4 professional packers from the moving company
Load the moving truck with the boxes	5 hours	Team of 3 professional movers from the moving company
Transport boxes, unload the boxes, and move to the offices	6 hours	Team of 3 professional movers from the moving company

However, some changes have recently occurred….

In this exercise, you will be assigned one of the scenarios listed below. Each scenario represents a different situation/change. The purpose of this exercise is to assess and understand how changes can impact original estimates.

Instructions: Read your assigned scenario and develop 5-7 probing/clarifying questions that you would ask the moving company representative.

Moving Company 1: You discover the award was given to this moving company because it submitted the lowest bid. You are surprised to learn that this moving company has not previously worked on campus. The moving company's estimate is based on industry standards for office moves – no site visit has been conducted and your project team has not yet met with the moving company.

Moving Company 2: This moving company has completed multiple moves on campus. Your sponsor advises you to get feedback on the company from prior moves. The feedback is that the company seemed to impose last minute charges and cause delays because of things they did not expect. You discover the estimates were based on an after-hours walk-through of the current and the new locations with no conversations with anyone on the project team or in the office staff.

Moving Company 3: The moving company just announced a change in ownership and the move coordinator assigned to your move has recently been terminated from the moving company. She prepared your estimates and you really liked working with her as she provided excellent customer service. Unfortunately, she will no longer be available for your move. You've left voice mail messages for the new move coordinator, but have not yet received a response.

Moving Company 4: This moving company recently toured the offices and sent you a memo stating they plan to complete the move over the weekend and none of the 78 people should be on site at either location when the move occurs. In addition, you have just received feedback from some of the 78 people who are very frustrated with the move plans and are very concerned that no one seems to be listening to issues they have raised about the move. They tell you that someone from the moving company toured their area to create moving estimates, but seemed very impersonal and was not willing to talk about any of their special needs or concerns.

Change Template

PROJECT X
ISSUE TRACKING / SCOPE CHANGE LOG

This tool should be kept current throughout the project lifecycle. Any key issues / change requests identified here should be included on Status Reports. The Log becomes part of the project records.

Project:_____   Date Generated: _____

#		Date Reported	Type *(Issue, or Scope)*	Priority *(High Med, or Low)*	Status *(New, Open, or Closed)*	Owner / Resolution Approver	Target Resolution Date	Resolution / Action Steps Taken	Actual Resolution Date
1.									
2.									
3.									
4.									
5.									
6.									
7.									

Priority:
High: Major impact on project schedule, budget, or performance
Medium: Impacts important activity but can still be managed within the project scope, schedule and performance targets
Low: Impact to the project can be minimized.

Case Study Exercise 8 – Lessons Learned

Identify lessons learned given the following information about the schedule and the expenditures:

- **Project Schedule**

Original Plan	Actual Results	Reason for Variance
Month 1 Design proposal approved	**Month 1**	
Month 2 Order modular furniture	**Month 2** Design proposal approved	Additional 2 weeks required to get approval
	Month 3 Order modular furniture	
Month 4 Construction begins	**Month 4** Construction begins	Order delayed by 4 weeks due to delay in design approval
Month 5 Modular office installation Construction completed		Demolition delays resulted in construction schedule slippage
Month 6 Moving begins Move-in complete	**Month 6** Construction completed Modular office installation Moving begins Move-in complete	Due to delays, extra resources were required for the move. However, the move was completed by the due date.

- **Project Budget**

	Budget	Estimated Expenses	Actual Expenses
Project Budget	$450,000		
Construction		-$125,000	-$150,000
Purchase / Install Office Furniture, Computers, Phones, etc.		-$300,000	-$325,000
Moving		-$5,000	-$4,000
Contingency	-$20,000	$0	-$20,000
Total	$430,000	-$430,000	-$499,000

Explanation of variances
- Actual construction costs were higher due to more complicated demolition than anticipated
- Actual purchase/installation costs were higher due to OT and expedited deliveries because of delays
- Actual moving costs were lower due to compressed move schedule
- Contingency was used to partially cover shortfalls in the construction and purchase

Describe possible lessons learned below:

Case Study Exercise 9 - Project Celebration

Brainstorm possible ways to celebrate the completion of this project or one of your current projects: