

Is Project Management Software Useful for PR?

James L. Horton

Quick. How much time will it take and at what cost to put on a fundraising dinner for 200 people with silent auction and entertainment, say a local band? How would you go about figuring the cost in terms of time spent on the project? Would it be \$10,000, \$20,000, \$50,000? The client wants weekly, sometimes daily, reports on how you are doing. Who is going to do the dinner arrangements? Who is going to find items for the silent auction? Who is finding and auditioning local bands? What is the event likely to earn at \$200 a ticket? O, by the way, the client wants your budget by tomorrow morning.

This is a situation for which project management software was made. It allows one to break down the steps of a project, cost them and put them back together for a complete view. It also allows one to track a project as it unfolds and keep an eye on critical tasks.

Project management software is not for the creative mind that thinks big ideas but dismisses minutiae. The kind of individual who uses it best is one who can break big ideas into ordered, finite steps. This is a skill that is not easy to learn and may be beyond some PR practitioners. For those engaged in repeated activities, project management software allows one to systematize procedures and better control costs. Repeated activities might include producing annual reports and annual shareholders meetings, issuing annual studies, following procedures for publishing intellectual capital, producing regular publications like e-mail newsletters or corporate magazines, conducting regular updating of web pages, issuing regular press releases and performing media monitoring and reporting among other activities. Project management isn't exact but it forces one to think in detail with greater precision. It is surprising how even simple activities entail multiple procedures. Project Management is especially useful for telling clients "what I have done for you lately."

Full disclosure... This is not the first time I've written about Project Management software. I first looked at it more than 10 years ago in earlier versions of PC software. It was difficult to use then: It is not much easier now because of detail one enters into the system. One can budget projects on a spreadsheet, but project management software allows close focus and less time to get multiple reports to track a project. Project management builds the database, calculations and reporting. On the other hand, it takes time to use Project Management software well.

Project Management. What it is.

Project management is a way to track people, time and resources over the duration of a project using computer software. A project is a defined activity with a beginning, middle and end. Project management software would not be useful for retainer relationships where there is a continued presence and a multiplicity of activities, nor may it be worth the time for simple projects that one will do once and never again. However, since more and more PR agency work is being looked upon as projects, the software may have growing appeal for practitioners tired of “picking budget numbers out of the air.”

A project has discrete steps budgeted into time, and it is in finite steps that project management can go awry. Someone who has never run the kind of project being detailed is likely to assign steps and values that are unrealistic. Therefore, project management is best done by someone who has completed a similar project before and knows the steps that go into it.

Like many management principles, project management isn't new. Henry Laurence Gantt, a mechanical engineer and disciple of scientific management first published the Gantt chart in 1910. The Gantt chart has been used ever since as a basic management tool for tracking. The Gantt chart is a horizontal bar chart that tracks multiple activities, which may or may not be interrelated. That is, either an activity must be completed before another can be started or two activities have to occur at the same time. The Gantt chart has proven useful for a small number of activities, but it is unwieldy for hundreds of steps at a time, even though the chart today is computerized. Further, the Gantt chart doesn't show the full range of time, cost and scope of work well because it focuses on activity.

A second element of Project Management software is the PERT (Program Evaluation and Review Technique) chart. The PERT chart isn't new either. It was originally developed for the US Navy in the late 1950s to track the building of missiles. The PERT chart shows the tasks it takes to get a job done and how tasks are interrelated. One discovers which tasks, if not done on schedule, can slow an entire project down. Using the dinner for 200, one cannot invite people to the dinner until the hall is rented and one cannot conduct a silent auction without items to auction. With complex projects that have many moving parts, a PERT chart lets one wend through activities to find those that are critical.

A third element of Project Management software is Critical Path Method (CPM). This lets one know how long it will take to get a project done and like the PERT chart, the critical elements along the way. That is, if we start today putting elements together for a dinner party for 200 guests with silent auction

and live entertainment will we be done in time for the planned date of the party a month from today? DuPont developed critical path calculations in the 1950s at the same time the PERT chart was invented. CPM calculates the time to get a project done and tasks critical to the process versus tasks with float time. Float-time tasks can be done over time without slowing the project down. Critical tasks cannot. Think again of the dinner party for 200 with silent auction and entertainment. Once the hall is rented, you have a few days before worrying about menu and décor – whether to have flowers on the tables or not, the color of tablecloths, etc.

Today, Gantt chart, PERT and CPM are all boiled into Project Management software that runs on a personal computer. There are several systems available but this essay is based on a copy of Microsoft Project. Here, for example is a task template for producing an annual report.

(<http://office.microsoft.com/en-us/templates/TC012330831033.aspx?CategoryID=CT101172331033>) from Microsoft Project.

Every project management system focuses on the time, cost and scope of a project. Time: how long it will take? Cost: What will it cost in salary and other resources? Scope – what exactly is being delivered at the end of the project? These are essential along with detailed steps of the project.

Consider using project management software when dealing with a complex task that has many moving parts and you are not sure that you can track them all. Project management software, when done correctly, allows a manager to have a clear idea of where levers are to make sure a project is done on time and on budget. Complex projects can quickly spin out of control, even with close control over their elements.

A quick story... Years ago I was working with an auto manufacturer who had built a racecar for the Indy Car circuit and wanted to unveil it to the media. The manufacturer brought the car to mid-town Manhattan and wanted to unveil it under spotlights in a hotel ballroom. The plan seemed simple enough. Put the car in a truck, carry it to the site, put it on the elevator at the hotel and take it up to the second floor ballroom where workers would push the car into place the night before the event. Electricians would then train spotlights on the car, and it would be ready for the press in the morning. Everything went like clockwork. The truck arrived outside the hotel on time. The car was on the street ready to be pushed onto the freight elevator. The freight elevator was --- broken? Yes, the freight elevator hadn't been working for two days, and no one told me. It took panic and screaming to get the freight elevator wired so it would move and lumber to the second floor with the car. The hotel workers weren't happy: I was steamed. The client never found out. Any project – even a simple project – can go terribly wrong when

one is not aware of the critical elements. In this case, it never occurred to me to check and see if the freight elevator was working, nor did the hotel think to tell me.

Using Project Management Software – an example.

Let's focus on the dinner for 200 people with live entertainment and a silent auction. It is a simple project but it demonstrates how project management software works and what one can do with it. This example looks only at the time spent to get the dinner ready and not printing and other costs, which are budgeted separately.

Before one uses Project Management software, one starts with a work breakdown structure. This is a hierarchy of tasks with roots branching like a tree. It captures all work to be delivered. Defining a work breakdown is essential because once one starts to enter tasks and prioritize them, inserting new tasks and deleting old ones can seriously impair the software's calculations and send one into a circle of changes that only get worse. Until one has done this once, there is no way to explain how frustrating it can be to undo errors that shouldn't have been made in the first place. Take time with the work breakdown structure. Time spent upfront saves enormous time at the back end.

Let's see what the dinner party will involve? (See illustration of work breakdown structure) It is a lot more complicated than one would think. Major tasks include setting up and running the dinner, entertainment, and silent auction, finding a dinner speaker and clean up after the dinner is over. Beneath these major tasks are subtasks broken into 16 discrete categories. Each of the subtasks will break down into repeated or "one-off" steps. The complete list of steps with milestones runs to 75 entries. (See illustration of task list).

The person who is running the dinner assigns point ratings on the basis of difficulty of getting the task done. Finding the right people and getting them to pay to show for the dinner is the most difficult and time consuming task for the fundraiser – even more than finding items for the silent auction, a band and a speaker. This means in the listing of steps, the planner will concentrate time and resources on finding the right people. He will put his best and most expensive person on that project and less expensive and less skilled people on other tasks.

If we have three or more people working on this dinner, we also have a problem with coordinating between them to keep everything on schedule. This will require coordination meetings and as part of those meetings, the leader of operation also will report to the client on how things are going.

The next step is to enter separate tasks into the project planner software with times associated with each. The software is set up to respect weekends and holidays and will move a task to the following day if one over-allocates someone on a day. One can also ask the software to level resources automatically – and it will so no one is working 14 hours while everyone else is working five. Note that there are a number of tasks throughout the steps that have no hours assigned to them. These are milestones – markers in the plan, if you will, that allow one to know when to turn to another activity or when an activity should be completed. Milestones are important because they allow one to separate subtasks into discrete packages and to keep track of everything happening without wading through tasks to determine what is happening or about to happen. One cannot be too rigorous in this part of entry. Milestones are like road signs that tell you where you are and where you have to go. Use them liberally.

The next task is to assign times for completion of each discrete task. This is where judgment enters in and where the person who has run a similar project has an advantage. Some tasks seem easy but are quite difficult to complete and vice versa. Only an experienced fundraiser and dinner planner would know how easy it might be to get the right 200 people to show up and how willing local businesses would be to donate items for a silent auction. Only an experienced person would know who is not talking to whom and who to position next to the person at a table that might cajole a larger donation from the participant.

The third task is to assign predecessors for each task if there are any. A predecessor is a task that has to be completed before the next task can begin. One can't decorate a hall until one rents it. One can't have a band play until one hires the band. The fourth task is to assign the resources to each task. In this case, we have four individuals working on the dinner and auction. The goal is to keep them busy getting the dinner done without working any one of them too long or putting the wrong person in charge of a job. I have hidden two columns in this task list – the date each task is started and finished. Project Management software will list those dates for the manager to check daily to see whether they have been done or not. One can manipulate those dates as well and tell the system when to start a project and when it must be completed.

Once all data is entered into the Project Management software system, the software performs its magic. It gives one an abundant number of ways to look at tasks – Summary of the total project, current activities, labor costs, assignments, top-level tasks, critical tasks, working days, holidays. Visually, the system will provide a Gantt Chart of ordered tasks, a Pert chart, a calendar, resource graphs and more. All these are different ways to view the

same data in order to help the manager know where things stand. They also allow reporting to the client on a daily basis, if necessary, on how the dinner is coming along and where the project stands.

As the project unfolds, the manager can track tasks that are on schedule, those that are lagging and those that are critical. At the end of the project, the manager can go back over the project plan to see what was close to the mark and what needs improvement in the future.

This is but a fraction of what Project Management Software can do for complex management assignments. While many, if not most PR practitioners do not use such software today, it may make sense to look into it and to see if your organization can benefit from the disciplined approach to task and program completion that project management software allows.

The answer to the opening question by the way is \$18,013 to do the dinner 362 man hours. This does not include the cost of the band, menu and décor. Add those in and you have a budget that looks something like this:

Manhours to implement dinner, silent auction and entertainment. Four people	\$18, 013.
Menu plus cash bar	\$3000
Décor (Flower centerpieces for 25 tables)	\$500
Band (Three hours)	\$2,000
Incidentals	\$1,000
Subtotal	\$24,513
Quote to client with contingency	\$25,000 or \$125 a ticket to break even.

To make any money at all, the cost would need to be \$200 a ticket for the evening – one reason why so little money is raised for such dinners when professionals run them. If one can run the dinner with all volunteers the return to the client and ticket price drop dramatically.

These are all considerations when making a budget. In some cases, clients don't want to make money on a dinner but to use the dinner as a way to reach influentials and to have the dinner pay for itself. In the end, however, unless one has budgeted closely, there is no telling what will happen and a disaster can be just around the corner. That's what Project Management software guards against.

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Illustration – Work Breakdown Structure.

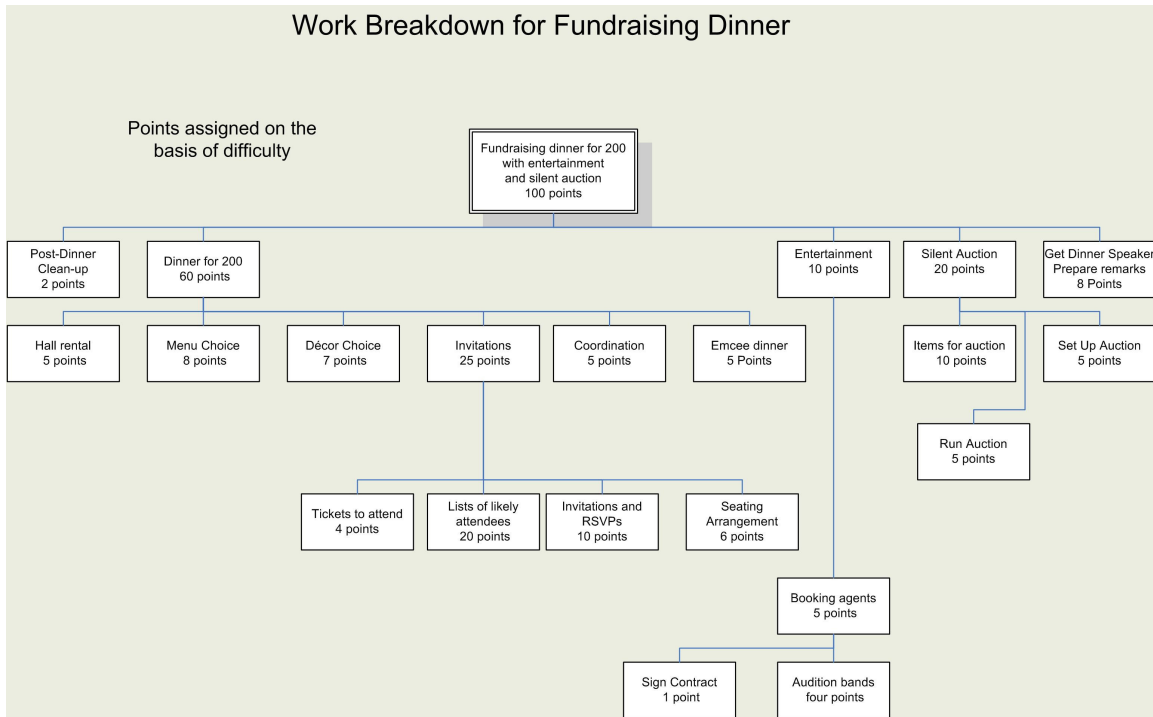


Illustration - Tasks

ID	Task Name	Duration	Predecessors	Resource names
1	START PROJECT	0h		Smith
2	START PLANNING	0h		1 Smith
3	Plan for dinner and make work assignments	6h		2 Smith
4	Hand out assignments and deadlines	1h		3 Smith
5	START SILENT AUCTION	0h		4 Jones
6	Get list of local businesses	3h		5 Jones
7	Call Local businesses for donations	3h		6 Jones,Wesson
8	Call Local businesses for donations	3h		7 Jones,Wesson
9	Call Local businesses for donations	3h		8 Jones,Wesson
10	Call Local businesses for donations	3h		9 Jones,Wesson
11	Call Local businesses for donations	3h		10 Jones,Wesson
12	Call Local businesses for donations	3h		11 Jones,Wesson
13	Call Local businesses for donations	3h		12 Jones,Wesson
14	Call Local businesses for donations	3h		13 Jones,Wesson
15	Call Local businesses for donations	3h		14 Jones,Wesson
16	Call Local businesses for donations	3h		15 Jones,Wesson
17	Inventory donations	3h		16 Jones,Wesson
18	Make elements for bidding - clip boards, papers	3h		17 Jones,Wesson
19	SILENT AUCTION COMPLETION	0h		18 Jones,Wesson
20	START ENTERTAINMENT	0h		4 Jones
21	Call booking agent	1h		20 Jones
22	Audtion bands	1.5h		21 Jones
23	Audtion bands	1.5h		22 Jones
24	Audtion bands	1.5h		23 Jones
25	Audtion bands	1.5h		24 Jones
26	Audtion bands	1.5h		25 Jones
27	Audtion bands	1.5h		26 Jones
28	Select band and sign contract	1h		27 Jones
29	ENTERTAINMENT COMPLETION	0h		28 Jones
30	START DINNER FOR 200	0h		4 Smith
31	Call hotels and check ballroom availability	4h		30 Maynard
32	Call hotels and check ballroom availability	4h		31 Maynard
33	Inspect ballrooms	1d		32 Smith,Maynard
34	Select Ballroom and sign contract	2h		33 Smith
35	END BALLROOM SELECTION	0h		34 Smith,Maynard
36	Get/develop list(s) of invitees	1d		35 Smith,Maynard
37	Get/develop list(s) of invitees	1d		36 Smith,Maynard
38	Develop invitation	1d		37 Smith,Maynard
39	Mail invitation	1d		38 Smith,Maynard
40	Build RSVP list and followup calls	4h		39 Smith,Maynard,Wesson
41	Build RSVP list and followup calls	4h		40 Smith,Maynard,Wesson
42	Build RSVP list and followup calls	4h		41 Smith,Maynard,Wesson
43	Build RSVP list and followup calls	4h		42 Smith,Maynard,Wesson
44	Build RSVP list and followup calls	4h		43 Smith,Maynard,Wesson

45 Build RSVP list and followup calls	4h	44 Smith,Maynard,Wesson
46 Build RSVP list and followup calls	2h	45 Smith,Maynard,Wesson
47 Build RSVP list and followup calls	2h	46 Smith,Maynard,Wesson
48 Build RSVP list and followup calls	2h	47 Smith,Maynard,Wesson
49 Build RSVP list and followup calls	2h	48 Smith,Maynard,Wesson
50 Build RSVP list and followup calls	2h	49 Smith,Maynard,Wesson
51 Build seating arrangement chart	2h	50 Smith,Maynard,Wesson
FINISH RSVPs, FOLLOWUP CALLS, SEATING		
52 CHART	0h	51 Smith,Maynard,Wesson
53 START COORDINATION MEETINGS	0h	4
54 Coordination meeting	1h	53
55 Coordination meeting	1h	54
56 Coordination meeting	1h	55
57 END COORDINATION MEETINGS	0h	56
58 START DINNER REMARKS	0h	4 Smith
59 Choose speakers for dinner	3h	58 Smith
60 Invite speakers to dinner	2h	59 Smith
61 Revise speaker list	3h	60 Smith
62 Write speaker remarks	1d	61 Smith
63 Get approval from speakers	4h	62 Smith
64 END DINNER REMARKS	0h	63 Smith
65 START DINNER IMPLEMENTATION	0h	63,57,52,35,29,19
66 Move all materials to safekeeping at hotel	5h	65
67 Coordinate room set on-site	2h	65 Smith
68 Coordinate band and setup	2h	65 Jones
69 Coordinate silent auction setup	2h	65 Maynard,Wesson
70 Coordinate reception setup	2h	65 Smith
71 Log in guests	1h	70 Jones
72 Run silent auction	2h	69 Maynard,Wesson
73 Emcee dinner	2h	67 Smith
74 Post-Dinner cleanup	0.5h	71,72,73
75 End of Dinner, entertainment and silent auction	0h	74

Illustration – Gantt Chart

ID	Task Name	Start	Finish	Duration	Feb 2007																	
					13	14	15	16	17	18	19	20	21	22	23	24	25	26				
1	Task 1	2/13/2007	2/13/2007	1d	█																	
2	Task 2	2/14/2007	2/15/2007	1d		█	█															
3	Task 3	2/16/2007	2/16/2007	1d				█														
4	Task 4	2/14/2007	2/15/2007	1d		█	█															
5	Task 5	2/19/2007	2/19/2007	1d										█								

Illustration – PERT Chart

