

choice to achieve the “lightning rod” effect whereby any negative concern was directed to an outsider. Also, the consultant—as an outsider—could criticize and comment in ways that should not be done by the engineering department managers who will have long-term working relationships among each other. It was agreed in advance that a consensus would be sought to the greatest possible extent, avoiding any votes on how to handle particular issues which leaves the “nay” votes feeling that their interests have been overridden by the majority. If consensus could not be achieved, then the issue would be sidestepped to be deferred for later consideration; if sufficiently important, then a joint solution could be developed outside the session without the pressure of a fixed closing time.

### Phase III. Project plan development

The output of Phase II (the set of consensus conclusions) represented both guidelines and specific conclusions concerning the nature of a PM&C system. Recognizing that the PM&C program will be viewed as a model project and that it should be used as such, serving as an example of what is desired, the program manager prepared a project plan for the PM&C program. The remainder of this paper is primarily concerned with the discussion of this plan, both as an example of how to introduce a PM&C system and how to make a project plan. The plan discussed in this paper and illustrated in Figures 3 to 11 is the type of plan that is now required before any capital project may be submitted to the approval process at Heublein.

### Phase IV. Implementation

With the plan developed in Phase III approved, it was possible to move ahead with implementation. Implementation was in accordance with the plan discussed in the balance of this paper. Evaluation of the results was considered a part of this implementation.

### Project Plan

A feature of the guidelines developed by the engineering managers in Phase II was that a “menu” of component parts of

a project plan was to be established in the corporate PM&C system, and that elements of this menu were to be chosen to fit the situational or corporate tracking requirements. The menu is:

1. Introduction
2. Project Objectives
3. Project/Program Structure
4. Project/Program Costs
5. Network
6. Schedule
7. Resource Allocation
8. Organization and Accountability
9. Control System
10. Milestones or Project Subdivisions

In major or critical projects, the minimal set of choices from the menu is specified by corporate staff (the definition of a “major” or “critical” project is a part of the PM&C procedure). For “routine” projects, the choice from the menu is left to the project manager.

In the PM&C plan, items 6 and 7, Schedule and Resource Allocation, were combined into one section for reasons which will be described as part of the detailed discussions of the individual sections which follow.

### Introduction

In this PM&C system, the Introduction is an executive summary, with emphasis on the justification of the project. This can be seen from the PM&C Program Introduction shown in Figure 3. It is to the advantage of everyone concerned with a project to be fully aware of the reasons for its existence. It is as important to the technicians as it is to the engineers or the corporate financial department. When the project staff clearly comprehends the reason for the project’s existence, it is much easier to enlist and maintain their support and wholehearted efforts. In the Heublein PM&C system, it is expected that the introduction section of a project plan will include answers to these questions: What

External and internal factors make it urgent to ensure most efficient use of capital funds. Implementation of a project management and control (“PM&C”) system has been chosen as one way to improve the use of capital funds. The Corporate Management Committee defined this need.

Subsequently, Corporate Facilities and Manufacturing Planning performed a feasibility study on this subject. A major conclusion of the study was to develop the system internally rather than use a “canned” system. An internally developed system can be tailored to the individual Groups, giving flexibility which is felt to be essential to success. Another conclusion of the study was to involve Group engineering managers in the design and implementation of the system for better understanding and acceptance.

This is the detailed plan for the design and implementation of a corporate-wide PM&C System. The short-term target of the system is major capital projects; the long-term target is other types of projects, such as new product development and R&D projects. The schedule and cost are:

*Completion Date:* 1 year from approval.

*Cost:* \$200,000, of which \$60,000 is out of pocket.

**FIGURE 3** Introduction to PM&C program project plan.

type of project is ship? What are the way (that is, why v illustrates this app Heublein PM&C s

### Objectives

Goals for a project erable items. To so of a clear, compreh Often, deliverable i In constructing a r or is it “the certific a project (which ca beginning), asking answer. Also, defin tends to reduce the the Heublein PM& similar to a “statem specifications (deta erable item) which tives of the project.

Figure 4 shows program. It illustra statement: that they general statements particular statement tives are defined, it tion; the particular r

### General Objectives

1. Enable better
2. Enable Group
3. Provide the ca

### Specific Objectives

1. Reporting and
  - For commu
  - Initially for
2. Procedures M
  - Document p
  - Preliminary
3. Computer Sup
  - Survey with
4. General Educ
  - Provide bas academic au
  - Technical se

\*Defined at the PM&C

**FIGURE 4** Objectives