Exercise

# Project Boundaries

Consider the scenario described below and use the “W” questions to identify project boundaries.

Katie had just received an email informing her that she had been assigned to plan and run the annual sales meeting. She was on her way to her manager’s office to get information about the meeting. She approached her manager’s office and knocked on the door.

Her manager looked up, smiled and said, “Come in Katie.”

Katie entered the office and sat down while Andrew, her manager, closed out of the spreadsheet he was using. Pushing his chair back from his desk, he looked at her and asked, “What is on your mind?”

“I would like to get information about the sales meeting,” Katie answered. “I need to understand the boundaries and constraints so that I can start to plan it.”

“Well, this is the annual sales meeting where we review last year’s results and lay out the goals and objectives for the next year. We should plan to have it in the second week of January because all of the numbers will be in for the previous year by then,” Andrew stated.

“Okay,” said Katie. “I have a few other questions. First, who should be invited? I know that the sales team should come, but should we invite anyone from any other department?”

Andrew paused for a moment and then answered, “Yes, all of the field sales personnel should be invited. In addition, we need to invite the inside sales people and those providing sales support from Finance, HR, and IT. Let’s also invite everyone from marketing and our customer service managers.”

“Okay,” Katie said, “my second question is concerning where we should have the meeting. Last year the meeting was at that golf resort. Do you want to do the same or move it?”

“I want you to give me some options,” Andrew replied. “However, it must be easy to reach by train or car and it must have some entertainment or relaxation options.”

“What other constraints are there?” Katie inquired.

“The total budget is $100,000 and that includes travel and housing expenses for everyone. Make sure that you use purchasing to set up the contract with the resort or hotel. The event should be two nights and two days. The first night I would like to have an awards banquet. The first day is presentations in the morning and some type of recreation in the afternoon. That evening should be a fun banquet with some theme to it. The second morning is more presentations and that afternoon should be set aside for working groups to plan initiatives for the year. Next week after the staff meeting I will give you a detailed outline of who will present on each morning,” Andrew answered.

“I have one more question,” Katie stated hesitatingly. “Why are we spending money on an event like this?”

“That is an excellent question,” Andrew responded. “This serves two purposes. It publicly recognizes the outstanding performers, which serves as a motivation for others. Also, it gives me a chance to communicate the strategy and answer questions. This helps to align everyone on the message we are trying to send to our customers this year.”

Just then Andrew’s phone rang. He looked over at the number and said, “I need to take this call. Review your notes and see if you have any more questions. Let’s plan to get together on Monday to review your project plan.”