



AccessEd & Commonwealth  
Scholarship Training

# Research Project Management

Project management  
principles and practical tips

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@\_AccessEd  
#AccessEdTraining



# Welcome to today's workshop



## Zoom Housekeeping:

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- Please ensure you are **muted** if you are not speaking to the group
- We will pause for questions as we go
- If you are having connectivity issues, please try turning off your camera during the presentation; these can be turned on during discussion sections
- If you have any technical issues please privately message Sharmin in the chat for her help
- If you have a Question as we go, please use the chat function
- For breakout groups, we encourage use of your camera if possible please!

# AccessEd: Who are we?



- AccessEd is a non-profit organisation committed to supporting postgraduate researchers in their professional development and university access programmes to increase social impact globally.
- AccessEd has expertise working with international students and social enterprises, as well as delivering courses in transferable skills for the 21st century. AccessEd bridges the gap from education to the professional and public sectors.



# Introduction to your trainer



Former Management Consultant at PwC delivering training and working in the PPM (portfolio and project management) team

Worked as a Project Manager, Programmes Director - experience in multiple project management roles

Prince2 Foundation and Practitioner Certified

# Session 1: Objectives



To understand the various components of research project management. (Part A)



To make a practical assessment of your own approach to research project management. (Part B)

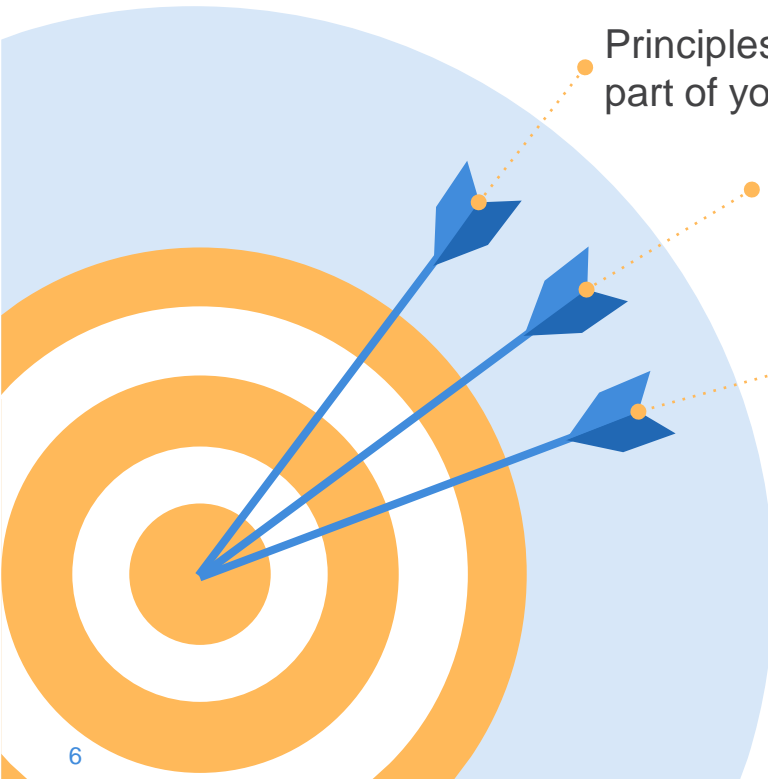


To explore options for 'plugging any gaps' in your current approach.

# Session learning outcomes



You'll get an understanding of and practical experience in:

A graphic of a target with three concentric orange rings and a central bullseye. Three blue arrows are shown flying towards the target from the left. Dotted orange lines connect the tips of the arrows to text boxes on the right.

Principles for project management - the best approach to this as part of your research

Tools to use for Project Management

Approaches to task management and stakeholder management

# Ice breaker





# Session 1A:

## Project Management Principles





# Session 1: Our Approach to the Session



- There is no single ‘right’ way of managing a project.
- Effective processes vary significantly across disciplines.
- You might already be using effective project management techniques.
- Designed so that you can listen to each other as well as me.
- Better to be conscious about the techniques you deploy and to compare.



# Thinking about your work like a project



What is your project?

01

How do you currently manage it?

02

What is working?

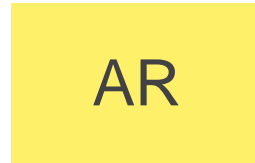
03

What is not working?

04

# Activity: How is it going?

## Introducing a four-point RAG rating:



- In groups, describe a project you are currently working on, RAG rate it according to the four-point system and explain why, e.g. progress against deadlines / risks (5 minutes each)
- It may help to rate different aspects of the project – depends on project, e.g.
  - (i) design/scope/overall clarity of project and task breakdown/budget sign-off;
  - (ii) data collection / primary research;
  - (iii) access to stakeholders, experts, colleagues, supervisors;
  - (iv) analysis, write-up, dissemination/impact plan
- Even where aspects haven't started, you can form a view based on whether you are well set up for it when it does start or the level of risk/activity required before then

# Unpicking your RAG rating



Good research project management can't resolve structural or academic problems with your research, but it can help you identify them.



If the research is viable, good project management will be the critical factor in successful and timely completion.

# Breaking Project Management down



# Task Management



- Tasks are all of the work items and assignments that need to be accomplished within a defined amount of time for a project to be completed.
- Task management (alone) is not project management: it can be a short-term, long-term or permanent process
- The central questions that effective task management need to answer are:
  - What sequence to these tasks needs to be completed in?
  - Which tasks are more important than others? How do I prioritise these?



# Time Management



- Time management = the way that you organise and plan how long you spend on specific activities.
- Focuses on how you complete the tasks in the most efficient way.
- At a basic level, it is about how you plan out your day – which can be deceptively different.
- There are lots of micro-techniques as well.



# Data Management



- Data management is the practice of collecting, keeping, and using data securely and efficiently.
- ‘Data’ is a broad term – incorporates all the materials that you collect.
- There are so many components to effective data management and approaches will vary depending on the type of data that you are collecting.
- For researchers, there are some crucial questions you need to answer about the system that you use:
  - If my data is sensitive, am I storing it securely enough?
  - As I collect data am I storing it in a way which will allow me to call on it when I am writing it up? (This is a question of labelling as well as storage)
  - As I collect data am I clearly recording where it came from?





# Stakeholder and Risk Assessment



- Research projects are not done in isolation. Successful project management involves mapping out your dependencies and the risks associated with them.
- Mapping your stakeholders and ensuring you have an approach to managing them is a crucial component of this.
- Again, the trick is to have a conscious technique, for thinking through your approach:
  - Have you analysed who the stakeholders in your research are? How influential are they?
  - Have you thought about when you will communicate with them?
  - Are you consciously aware of the risks to your project? How do you rate the seriousness of these risks?



# Progress Checkpoints



- Projects occur as a series of phases, structured along a timeline designed to produce deliverables, and meet stated goals.
- Checkpoints provide a basis for analysis and evaluation, to determine whether the project is proceeding as planned, and to take corrective action as needed.
- Typically, researchers use meetings with their supervisors as their checkpoints, but effective project management will build a series of other explicit deadlines around these.



# Activity: Project Management Self Audit



- Individually, complete the Project Management Self Audit (10 minutes)
  - Share your ratings with the group
- This will allow you to be conscious about the strengths and weaknesses in your current approach.
- It will also allow you to focus in on the techniques that we will explore in the next session.





# Tea Break





# Section 1B:

## Research Project Management: Tools

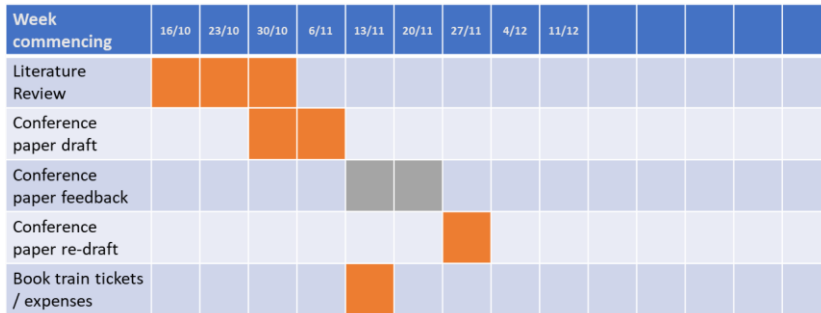


# Reflections on Project Management



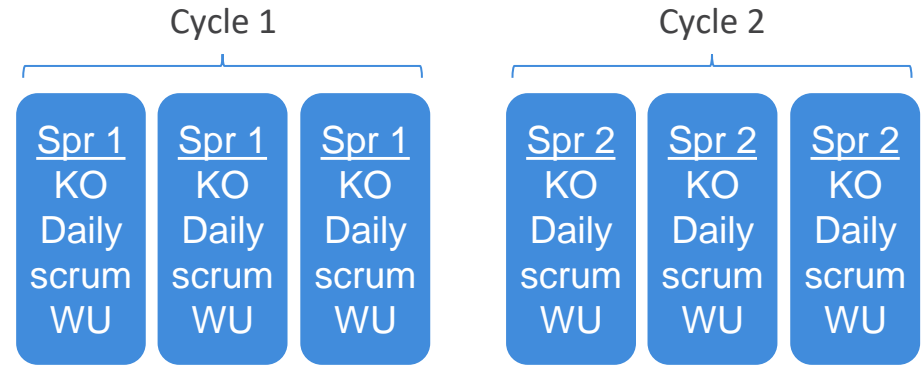
Is there a fundamental difference in approach?

## Waterfall



e.g. Govt contracts, research bids

## Agile



e.g. Software development

# Reflections on Project Management



**Is there a fundamental difference in approach?**

## Waterfall

- Clearly defined outputs
- Clearly defined timetable
- Comms plan agreed in advance

in conclusion, pre-specified

## Agile

- Clearly defined inputs (i.e. sprints)
- Flexible, responsive timetable
- Regular, intensive comms

in conclusion, adaptable

# Some Techniques for Time Management



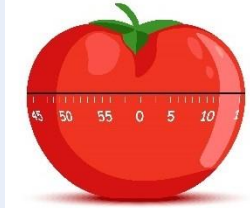
## Track and learn

- [www.manictime.com](http://www.manictime.com)
- [www.rescuetime.com](http://www.rescuetime.com)



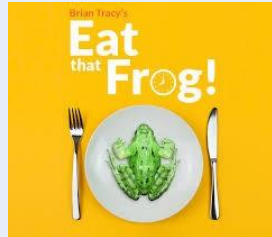
## Pomodoro technique

- [www.focusboosterapp.com](http://www.focusboosterapp.com)



## Eat your frog

- <https://www.briantracy.com/blog/time-management/the-truth-about-frogs/>



## Email technique

- Handle them a maximum of two times
- Think about when you see / send emails





# Some Techniques for Task Management



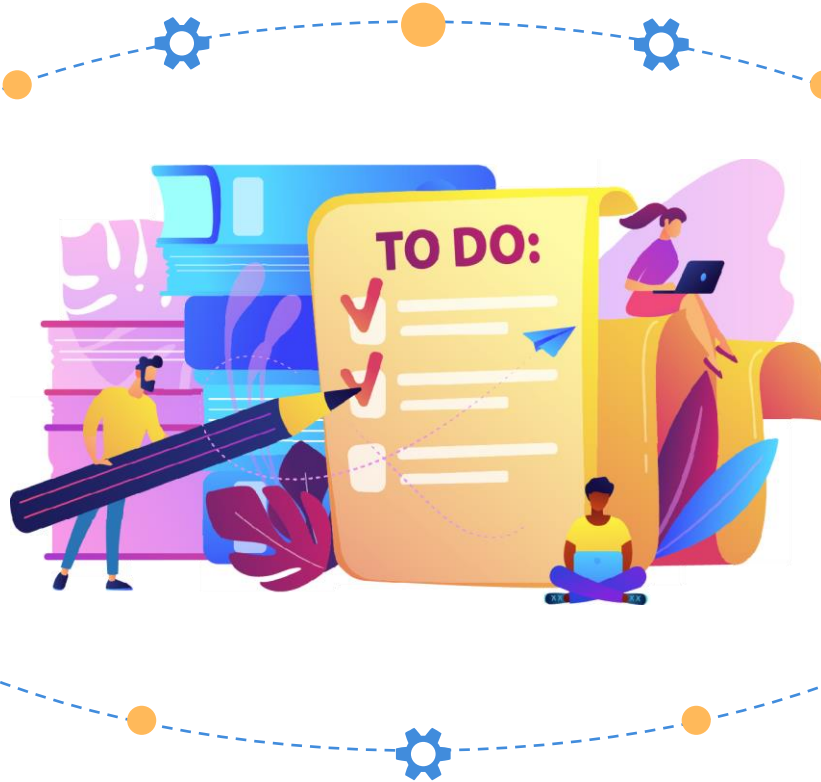
Writing a simple to-do list

Making it more nuanced by adding:

- Current status
- Priority ranking
- Deadline
- RAG

Use an online calendar or email provider

Use an app like Remember the Milk



# Activity: An Approach to Task Management

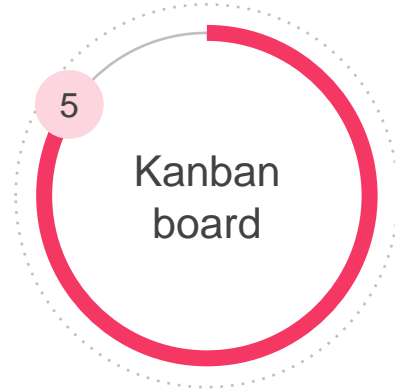
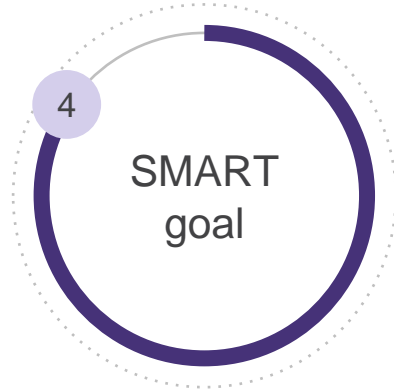
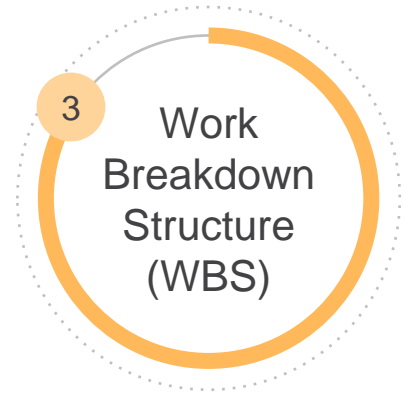
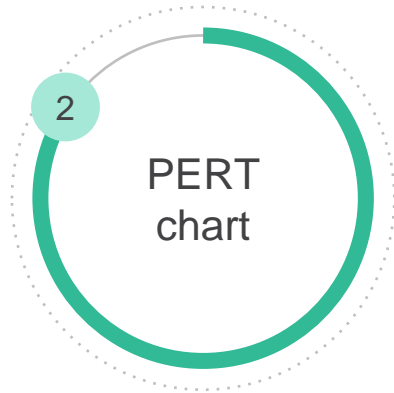
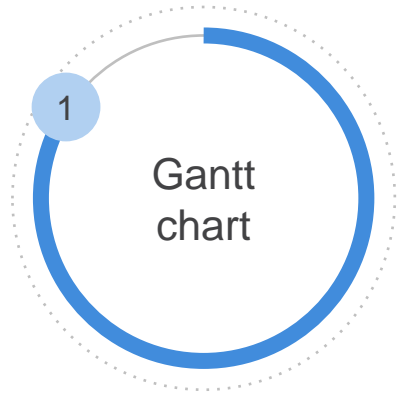
- Spend 5 minutes sorting your to do list into the these categories.
- Important and urgent are your frogs, by the way!
- Does this reflect the order in which you would actually do these tasks?



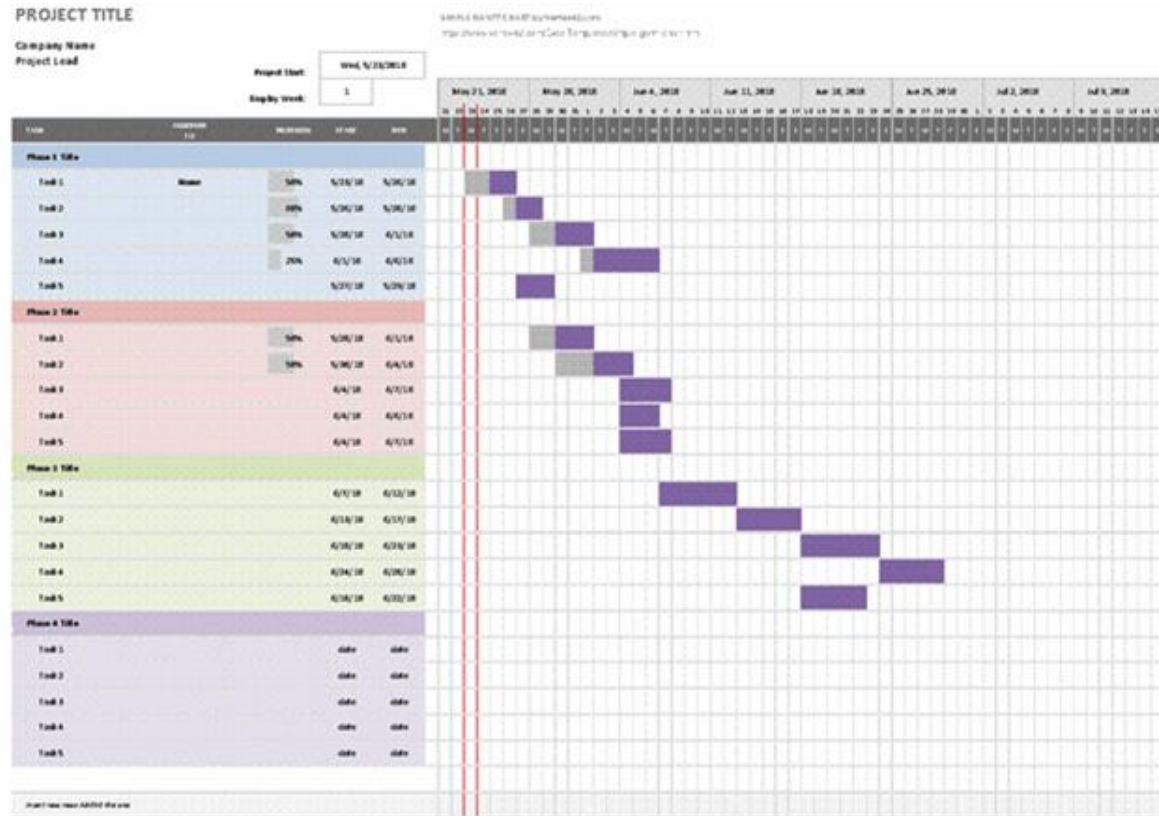
	Not urgent	Urgent
Important		
Not important		



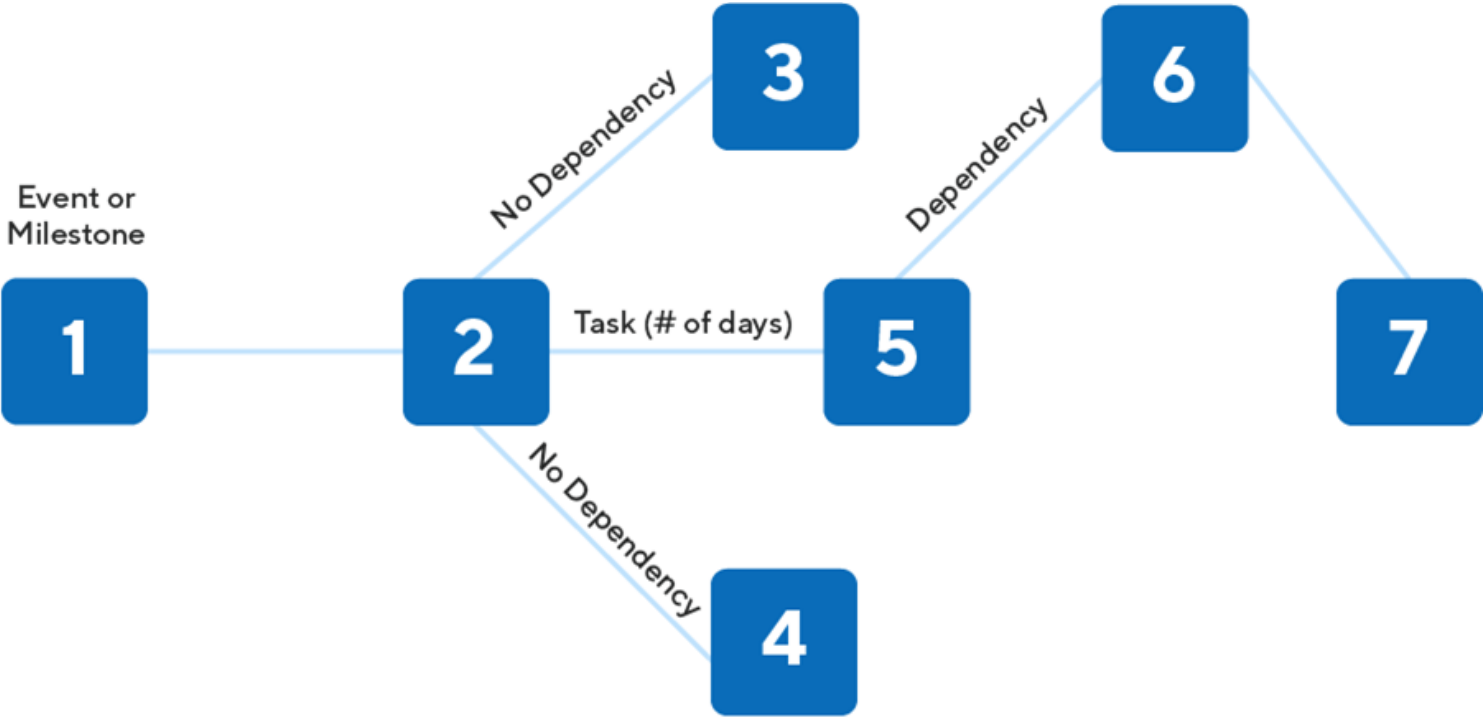
# Project management tools



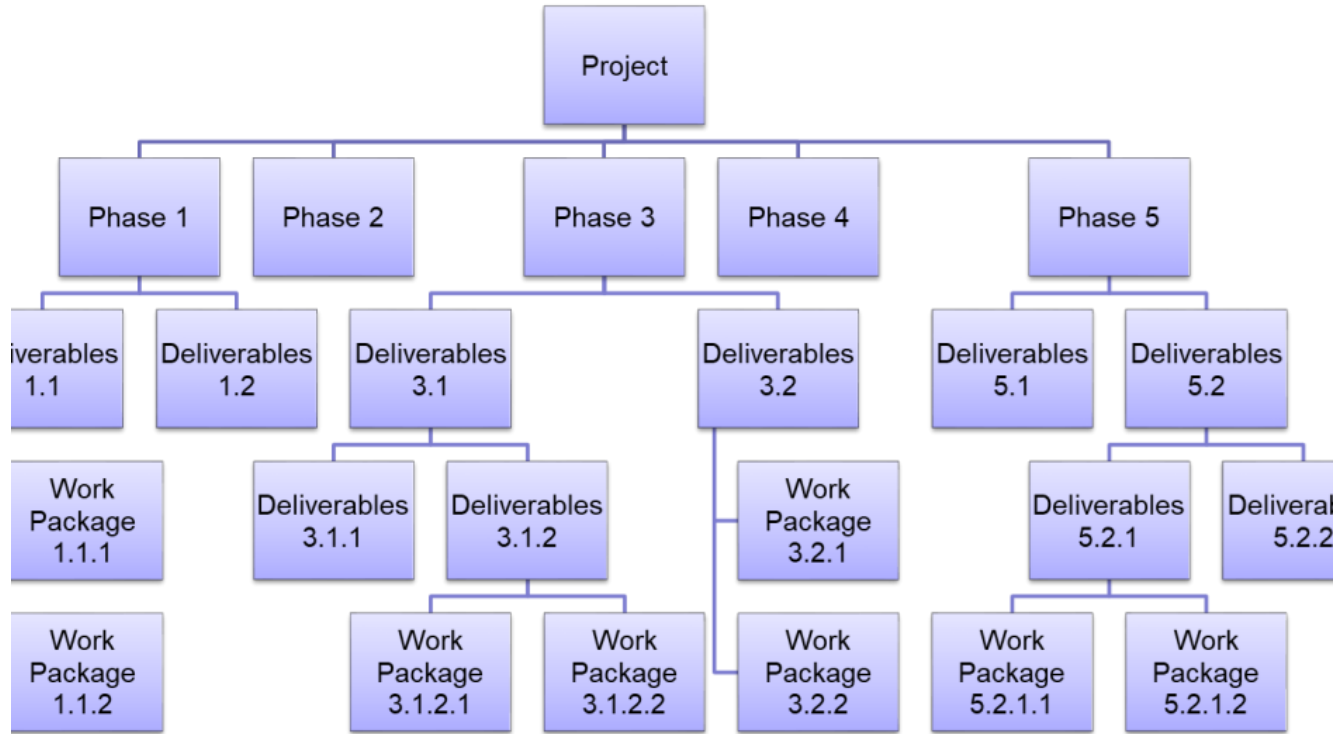
# Gantt Chart



# PERT chart



# Work Breakdown Structure (WBS)



# Kanban Board



Example of a Kanban Board					
Backlog	In Progress (3)	Peer Review (3)	In Test (1)	Done	Blocked
Fast Track/ Defect					

# SMART goal



**Specific**

**S**  
**G**

What do you want to do?

**Measurable**

**M**  
**O**

How will you know when you've reached it?

**Achievable**

**A**  
**A**

Is it in your power to accomplish it?

**Realistic**

**R**  
**L**

Can you realistically achieve it?

**Timely**

**T**  
**S**

When exactly do you want to accomplish it?



# Some Techniques for Data Management



- Use your computer efficiently:
  - e.g. Folder structure and naming files (20171018 NAME v.1)
- Information dump:
  - [www.evernote.com](http://www.evernote.com)
- Research dump:
  - [www.zotero.org](http://www.zotero.org)
- Sync and back-up:
  - Google Drive, DropBox, SugarSync



# Some Techniques for Stakeholder Management

- Consciously map out which stakeholders are important to your project.
- Use this to work out the frequency with which you should communicate with them, the content you should share, and how you should update.

- Spend 5 minutes sorting your stakeholders into the these categories.
- Very interested and influential are your key stakeholders.
- Does this reflect the order in which you are actually prioritising your relationships?

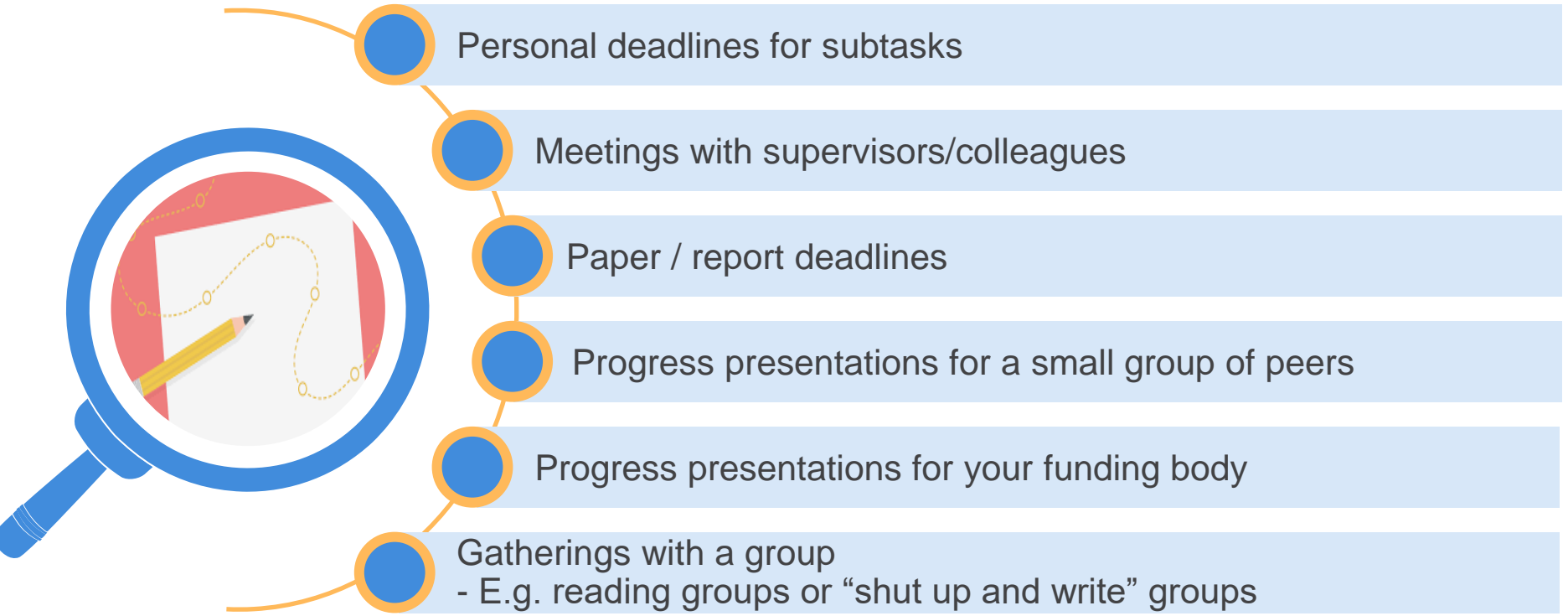


Interest of stakeholder	Very interested, limited influence	Very interest, very influential
	Low interest, limited influence	Low interest, high influence
	Influence of stakeholder	



# Progress Check Points

How do you know you are on track?



# Some Advice on Check Point Meetings

## Arrange them properly:

- Send a calendar invite with a specific location

## Be specific with the time:

- Don't necessarily just go with 1 hour
- Could it be 30 mins? Does it need to be 2 hours?

## Seek clarity:

- Keep a list of agreed actions through the meeting.
- Use the format: [PERSON] will do [XYZ] by [DATE].

## Follow up:

- Always send an email with a thank you and a list of actions.



# Checklist to clarify supervisor and researcher expectations



Checklist to clarify supervisor and PhD student expectations	
<p>Over a face-to-face meeting, clarify what is expected for all relevant points below and write down answers on paper. After the meeting, each person involved should keep a copy and bring it back anytime further discussion or adjustments are needed.</p>	
<b>PhD general formalities</b> <ul style="list-style-type: none"> <li>- how many years</li> <li>- possibility to extend</li> <li>- funding conditions</li> <li>- salary</li> </ul>	
<b>Scientific publications</b> <ul style="list-style-type: none"> <li>- number of papers required</li> <li>- first author paper</li> <li>- published or submitted</li> <li>- types of journal aimed</li> <li>- preprint, arXiv?</li> </ul>	
<b>Written thesis formalities</b> <ul style="list-style-type: none"> <li>- length requirement</li> <li>- format (can it include papers as they are)</li> <li>- will the supervisor correct the thesis before submission</li> <li>- need supervisor approval before submission</li> <li>- admin procedure from submission to defense</li> </ul>	
<b>Defense formalities</b> <ul style="list-style-type: none"> <li>- how long for presenting</li> <li>- how long for questions</li> <li>- deliberation, decision</li> <li>- public/private defense</li> </ul>	
<b>Supervisor</b> <ul style="list-style-type: none"> <li>- meeting frequency and format</li> <li>- types of deliverable expected</li> <li>- <u>how to assess progress when the supervisor is away</u></li> <li>- types of feedback expected</li> </ul>	

From <https://academic.net>

<b>Formalities of research project(s)</b> is it the student or the supervisor responsibility: <ul style="list-style-type: none"> <li>- to define the research topic</li> <li>- to decide the methodology used</li> <li>- to define a project outline with objectives, milestones and checkpoints</li> <li>- to check that the project is on track</li> <li>- to decide on project plan adjustments</li> </ul> <ul style="list-style-type: none"> <li>- administrative aspects</li> <li>- are there requirements and restrictions according to funding agencies</li> </ul>	
<b>Thesis committee formalities</b> <ul style="list-style-type: none"> <li>- committee during PhD thesis</li> <li>- committee at defense</li> <li>- how many people &amp; who chooses them</li> <li>- requirement for internal and external experts</li> <li>- timing and frequency of committee meetings</li> </ul>	
<b>Other official or unofficial supervision</b> <ul style="list-style-type: none"> <li>- e.g. from a postdoc, a senior PhD student, a lab manager, a technician</li> <li>- degree of involvement and role</li> <li>- what is expected from the PhD student towards this other person</li> </ul>	
<b>Collaboration within &amp; outside the lab</b> e.g. with other PhD students, postdocs... <ul style="list-style-type: none"> <li>- how tight is the collaboration</li> <li>- what is expected from each person actively involved in the project</li> <li>- what can each person expect to obtain from the collaboration and the project completion (e.g. authorship)</li> <li>- is there a risk for the persons involved not to go along well and what to do in such case</li> </ul>	

From <https://academic.net>

<b>Presentations and posters</b> <ul style="list-style-type: none"> <li>- requirement and possibilities</li> <li>- presentation within the institute</li> <li>- presentation outside the institute</li> <li>- possibilities to get grants for international conferences</li> </ul>	
<b>Teaching</b> <ul style="list-style-type: none"> <li>- requirements or possibilities (incl. supervising a bachelor or master student)</li> </ul>	
<b>Transferable skills training</b> <ul style="list-style-type: none"> <li>- requirements or possibilities</li> </ul>	
<b>Career plan</b> <ul style="list-style-type: none"> <li>- ideas, wishes, goals</li> <li>- what actions can be initiated already now</li> <li>- how to allocate time for it</li> </ul>	
<b>Social activities</b> <ul style="list-style-type: none"> <li>- within the doctoral program</li> <li>- within the institute</li> <li>- within the lab</li> <li>- other</li> <li>- general recommendations</li> </ul>	
Should another meeting be scheduled to discuss some of these points again? For example, in 6 months?	

From <https://academic.net>

# Activity: An Approach to Risk Management



Risk	Owner	Initial Impact Score	Initial Likelihood Score	Mitigations	Mitigated Impact Score	Mitigated Likelihood Score	Contingencies
		High Medium Low	High Medium Low		High Medium Low	High Medium Low	



- Talk through two risks to your current project with your breakout room
- Ask them to judge the initial impact and likelihood (high, medium, low)
- Then talk through the mitigations you are taking
- Again, ask them to judge the mitigated impact and likelihood (high, medium, low)
- Then describe any contingency (i.e. backup) plans



# 6 final tips for researcher project management

01

**Define your  
timeline**

02

**Prepare yourself  
for setbacks**

03

**Define your  
project scope**

04

**Add value, not  
experiments!**

05

**Define metrics  
of success**

06

**Make progress  
by failing early**



# Learning Portfolio reflections



**Group discussion: what have you learnt in relation to your Learning Portfolio aims?**





# Reflections





# Thank you

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