Survey
Project Management

A Practical Approach

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Surveying and Project Management

Agenda

- **Part 0 - Marketing**

- **Part I – Securing the Project**
  - Client Needs
  - Project Understanding
  - Staff
  - Proposal

- **Part II – Executing the Project**
  - Organization and Staffing
  - Kickoff and Safety
  - Data Acquisition/Data Management/Tracking
  - Accounting
  - Closeout/Lessons Learned

Part 0- Marketing

Approach or Lack Thereof

- **Repeat Business**
- **Industry Reputation**
- **Everyone "Markets"**
- **Tools**

Part I - Securing the Project

What do you need to Manage? What is the Priority?

- **Client**
- **Project Understanding**
- **Staff**
- **Proposal**

Part I - Securing the Project

What do you need to Manage? What is the Priority?

•Client

- **Communication**
- **Understanding Needs vs. Expectations**

- ▪ **Who – You & the Client**
  - ▪ **Key Personnel**
  - ▪ **Hierarchy & Rules of engagement**
  - ▪ **Project Politics**
- ▪ **How – Client Preferences**
  - ▪ **Phone/Email/Text/Social Media**
  - ▪ **Other**

- **When**
  - ▪ **Regular Interval**
  - ▪ **Project Milestones**
- **Why – *CYA!***
  - ▪ **Regular Updates**
  - ▪ **Changes to Scope**
  - ▪ **Issues**

Information Gathering

- **Project Understanding**

    - **Scope**
        - **Define (with Assumptions)**
        - **Refine**
        - **Finalize**
    - **Schedule**
        - **Targets / Milestones**
        - **Impacts to Staff Levels**
    - **Budget**

Part I - Securing the Project

What do you need to Manage? What is the Priority?

- **Staff**
  - **Credentials**
  - **Expertise**
  - **Availability**
    (Internal and 3rd Party)

Proposal Preparation

- **Proposal**
  - **Writing**
  - **Fee Estimating**
  - **Schedule Estimating**

Proposal

•Proposal Writing

- •Fully Understand RFP Requirements (if responding to one)

- •Documentation Mistakes Could Lead to Disqualification

- •Address Scope of Work

- •Suggest Alternatives (if allowed)

Proposal

- **Fee Estimating**
  - **Time & Materials/Cost not to Exceed/Lump Sum**
  - **For proposed scope and schedule / For Alternatives**
  - **Basis for your Fees (Assumptions)**

- **Schedule Estimating**
  - **Past Project History**
  - **Potential Impacts**

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- **Organization and Staffing**
- **Kickoff and Safety**
- **Data Acquisition/Data Management/Tracking**
- **Financial Accounting**
- **Project Closeout/Lessons Learned**

- **Organization and Staffing**

  - Internal Roles and Responsibilities
  - Client Management Roles
  - Technical Needs and Responsibilities

- **Kickoff and Safety – You and the Client**

  - **Client Communication**
  - **Expectations of Staff**
  - **Safety Focus and Priority**

Data → Information

•Data Acquisition/Data Management/Tracking

- •Defined Workflow from Field to Office to Delivery
- •Robust Data Management
- •Definition of Progress Tracking

- **Financial Accounting**
  - **Payment Terms**
  - **Setup of Phases and Staff Types**
  - **Reflective of Project Goals**
  - **Reflective of Assigned Staff**

- **Project Closeout/Lessons Learned**

  - **Timely Review at Project End**
  - **Complete Management Evaluation**
  - **Complete Technical Evaluation**
  - **Financial Assessment**

Other Related Topics

- **Document Control**
- **Data Security/Cyber Vulnerability**
- **Audits**
- **Warranty**

Thank You

Comments and Questions?

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