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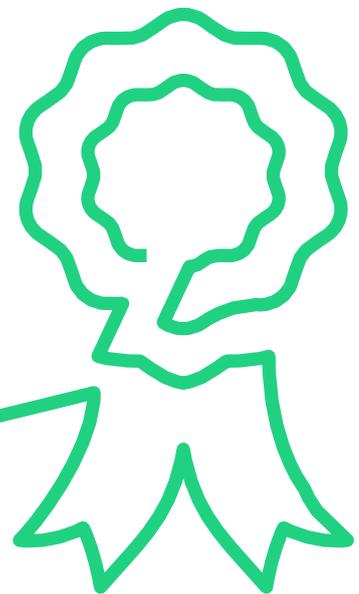
Sample Company Case Study
and Project 2.3

Contents

Disclaimer
All characters, businesses, companies, organisations, situations and
occurrences in this case study are fictitious. Any resemblance to any real
persons (living or dead), any businesses, companies or organisations
(or former businesses, companies or organisations), or any situations or
occurrences (that may have occurred at any time) is purely coincidental.

Note: some of Alastair's arithmetic on pages 24 and 25 is poor.
Incorrect numbers are highlighted in green.

Whiteline company overview

Whiteline Domestic is a UK manufacturer and distributor of white goods. The company was founded in 1965 by James White to offer affordable domestic products to working-class families buoyed by post-war improvements to UK housing stock and continued growth in their disposable incomes. Three initial products were launched – a refrigerator, a twin-tub washing machine and a spin dryer – and these yielded first-year sales of around 30% greater than projected. White prudently invested this profit in additional research and development (R&D) and production tools such that the company's product range, market penetration and reputation increased year-on-year. By 1970, Whiteline was consistently in the top three suppliers of UK white goods and White's industrial credibility and passion for his business was well known. A Queen's Award for Industry followed in 1976 and he was knighted three years later.

As Whiteline moved into the 1980s, its product range included several top-selling models of fridge, freezers (separate and combined), front-loading washing machines, free-standing cookers, dishwashers and vacuum cleaners. The company also launched its first range of microwave ovens in response to White's prediction that busy families with two working parents would create a demand for convenience foods that Whiteline freezers and microwaves would be happy to furnish.

White had repeatedly resisted approaches to take his company public, partly because he was adamant that Whiteline should remain predominantly British based. However, the company did make increasing use of electronic components from overseas – particularly Japan – at prices UK suppliers simply could not match. He elected to expand this strategy, including the buying in and badging of smaller kitchen products such as electric carving knives and can openers.

Growth and profits were maintained through the 1990s, and the 2000s saw eastern European states join the EU, opening the door to cheaper (and tariff-free) imported components. However, the 2008 stock-market crash hit Whiteline badly and, by the early 2010s, it had become little more than an assembler of imported parts rather than the 'British manufacturer' so prized by its founder. Despite this, its reputation as a dependable supplier at the lower end of the market remained intact, but profits were slim, investment in R&D was low and it was beginning to have less and less control over its direction of travel.

New directions

In 2015, and after 50 years at the helm, White decided it was time to step aside, and the board elected his daughter, Nicola, to succeed him, although there was some speculation as to why her brother Christopher (Human Resources (HR) Director) had abstained from voting. Nicola had joined Whiteline as a trainee production manager after graduating from a leading university and quickly gained a reputation for being organised and efficient but also pragmatic and approachable. Her father insisted she spend a year in marketing, after which she returned to the same university, gained a good MBA and resumed at Whiteline in the finance department, eventually rising to become its director.

Nicola immediately initiated a series of detailed consultations with staff at all levels, using the outcomes as a foundation to bring in city analysts GMPK to advise on the company's future direction. Its findings were that the white goods market would remain buoyant but highly competitive. The company's brand was well recognised, and it had all the elements within to continue delivering good products, but a rapid return to the top tier of suppliers was unfeasible. It badly needed a cash injection to fund better facilities and fuel new product development. The consultants also floated an intriguing opportunity.
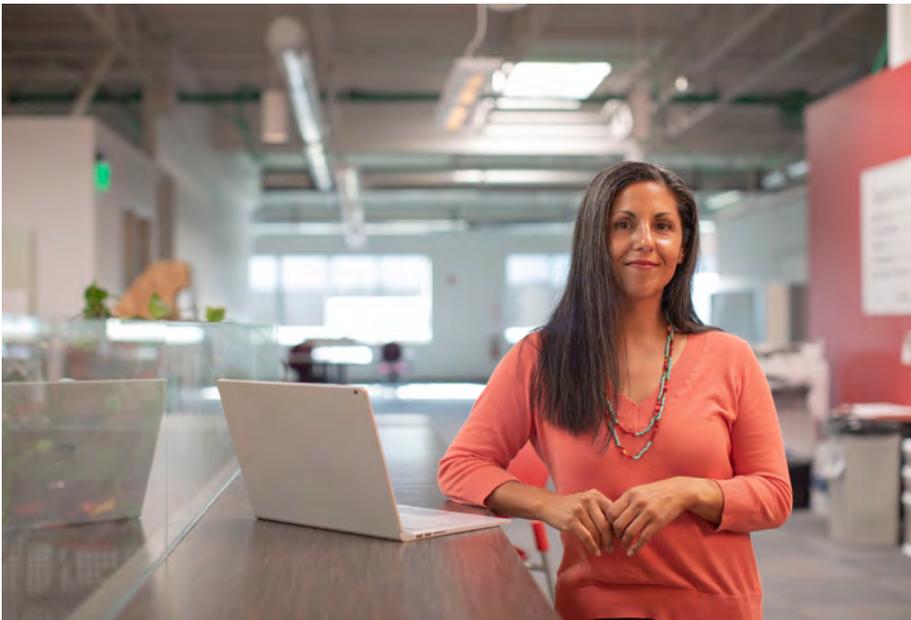
Sparta

It was rumoured that Sparta, a major high-street catalogue-based supplier of homeware products, was looking to buy into a manufacturer of electrical goods that could become the single source supplier for its own-brand product line. Off-the-record discussions indicated that Whiteline was a good potential fit, although it would have to expand its product range beyond white goods and kitchen products. The Whiteline Board were enthusiastic but were keen for the company to retain as much autonomy as possible. Negotiations began and a 'non-hostile' takeover was agreed, subject to the following key conditions:

- Whiteline would retain its own well-regarded identity and brand, but would become 'a Sparta Group company' and would supply only that group.
- Nicola would remain as chief executive and would also join the Sparta Board.

- Sparta's Director of Delivery, Phillip Garner, would join the Whiteline Board and would act as the conduit for setting current and future products and price points. Consequently, Whiteline's own sales and marketing function would cease, but with some staff being absorbed into Sparta.
- Savings from the move of sales and marketing would be used to fund ISO 9000 quality certification of the Whiteline operation and R&D towards a refreshed and broadened product line.
- Sparta would invest over a transitional period for relocation to more suitable premises.

A business case for a major transition programme was developed and agreed between both boards, affected staff and unions. This comprised several strands of project activity, centred on the relocation of existing Whiteline operations by about 30 miles to a former motorcycle plant at Lichworth in the Midlands. This was more modern and spacious than the former plant, and was sited closer to key motorway links and Sparta's own main distribution centre.

The new Lichworth base is about 12 years old and had previously housed production lines, storage and offices, so required only relatively moderate refitting to accommodate the new equipment and facilities for Whiteline operations. Factory production has just resumed, currently at about 80% capacity, although most office staff have yet to relocate.

The resumption of production marked the completion of a number of supporting projects and was a significant commercial milestone for the company. The board therefore decided to designate this the conclusion of Phase 1 of the transition programme, and a Phase 2 is now underway to relocate around 200 office and other supporting staff. This will see the transfer of all residual Whiteline activities and assets from the former site ahead of the termination of that lease.

Notes

Whiteline company structure

SPARTA MAIN BOARD

Nicola Evans-White
Chief Executive Officer

Bob Kubica Production Director	**Russ Braun** Technical Director	**Will Rome** Operations Director	**Phillip Garner** Sparta Director of Delivery	**Christopher White** HR Director	**Suneeta Bhartia** Finance Director

Production
John Kelly (Production Panager)

Warehouse
Morgan Chandaria (Warehouse Manager)

Paint
Val Spar (Paint Manager)

Testing & QA

Product design
Adrian Newley (Design Manager)

IT support
Ayesha Abidi (IT Manager)

Tech authors
Alastair Stewart (Authoring Manager)

Facilities
Phil Green (Site Manager)

Customer helpdesk

Health & safety

Transport

Security

HR
Gabrielle Peters (HR Manager)

Admin
Toni Banks (Admin Manager)

PAs

Reception

Finance

Payroll

Procurement

Legal & IPR

Profiles of key staff

The board

Nicola Evans-White   (Chief Executive Officer)

Daughter of founder Sir James White. Organised and efficient but also pragmatic and approachable. Leads from the front but values consultation. Shares her father's traditional values but also keen to get the best from new technologies and methods.

Christopher White   (HR Director)

Joined Whiteline after twice losing (his father's) investments in restaurant start-ups, but learned and matured quickly. Values staff as 'people, not numbers' but can be slavish to procedures. Respects Nicola but, as her older brother, can't shake some resentment of her success.

Notes

Will Rome   (Operations Director)

Knowledgeable, incisive and with boundless enthusiasm, although sometimes an impetuous decision-maker. Regular triathlete and naturally popular with staff. Has a mechanical engineering background and sometimes underestimates the complexity of electrical and IT tasks.

Bob Kubica   (Production Director)

Proudly assembled Whiteline's first ever microwave oven and has worked his way to the top of the production ladder. Respected for his experience of the company and the production of home appliances, but will not be rushed and does not always welcome new ideas.

Russ Braun   (Technical Director)

Nicola's first new recruit to the board, he sometimes views things differently to other members, especially Will. Respected for his considerable knowledge, although his passion for computerised product design sometimes leaves IT and the tech authors feeling neglected.

Suneeta Bhartia   (Finance Director)

Nicola's 'rock' due to her intelligence, eye for detail and considerable skills at navigating through (or round) financial and legal regulations. This sometimes leaves her team leaders feeling insecure and her chilly personality does not help these relationships.

Phillip Garner   (Sparta Director of Delivery)

The new arrival from Sparta. Pleasant and clearly very bright but seems keen to forge relationships with those who might be most useful to himself while neglecting others. Some suspect he may be conveying different messages to the two boards.

Project 2.3 team

Alastair Stewart   (Project Manager)

Surprise pick by Will, chosen for his good nature, diligence and eye for detail. He does produce impressive plans but sometimes falls short on delivery due to limited project management experience, a reluctance to grasp nettles and occasional inattention. Rumours that a headhunter has recently approached him have been circulating among the project teams.

Ayesha Abidi   (Deputy Project Manager)

IT manager, respected for her knowledge. Has emerged as the natural diffuser of tensions in the cramped portacabin. Experienced project manager with a relaxed leadership style, but does not enjoy conflict. She is also deputy project manager of Project 2.2 (refitting/equipping accommodation).

Adrian Newley   (Design Manager)

Fantastic designer but an average people manager with limited project management experience. He prefers computers to people and is currently stressed by the impending move of his team's expensive and delicate kit and the threat to design deadlines.

Notes

Gabrielle Peters   (HR Manager)

Knowledgeable HR manager but uninspiring and prefers to stay in her comfort zone. Her lack of project management experience showed as she recently made heavy going of the tender process for Project 2.4 (recruitment of new staff) for which she is project manager.

Toni Banks   (Admin Manager)

Has a good network of contacts and is adept at handling fastballs, navigating round obstructions and getting things done. Great interpersonal skills but highly competitive with Gabrielle and resents her more 'professional' status as HR manager.

Shani Patel   (Facilities team)

Has been offering some good practical ideas but will defer to more assertive people. Likes to be assigned a task and allowed to get on with it; not a big consulter of others.

Luca Campanaro   (Product design)

Straight from university and brimming with enthusiasm, ideas and charm. Only limited by his lack of practical experience of design and production at Whiteline.

Other staff

John Kelly   (Production Manager)

Experienced and conscientious manager who is very supportive of his team members. Takes reduced production personally, even if beyond his control.

Morgan Chandaria   (Warehouse Manager)

Highly effective but irritable when things aren't done 'his' way. Annoyed with Bob Kubica, who ignored his (correct) advice on warehouse/racking layout.

Val Spar   (Paint Manager)

Good leader but frustrated by the split of paint facilities and staff across both sites and Bob Kubica's reluctance to get Project 2.6 underway immediately.

Note: John, Morgan and Val are now liaising closely with each other to try to resolve problems, leaving Bob out of the loop unless absolutely necessary.

Notes

Transition programme, phase 2

With Phase 1 and the resumption of production at Lichworth complete, Phase 2 is now underway under the sponsorship of Will Rome (Operations Director). This was deemed to have started at a new week zero (ie day one of production at Lichworth) and will run until week 19, which marks the end of the lease at the former site. Phase 2 is subject to the business case, rationale, outcomes and budgets originally agreed for the programme and comprises six projects. Two of these are wrapping up residual work, two have recently started and a further two have yet to commence:

Project 2.1   Completion of the production warehouse and goods in/out facilities

Project 2.2   Completion of fitting out and furnishing/equipping all unfinished space

Project 2.3   Relocation and 'short' induction of all remaining staff and equipment

Project 2.4   Recruitment and full induction of new staff to replace those not relocating

Project 2.5   Commissioning of a new HR and payroll system

Project 2.6   Commissioning of a second spray-painting facility

Lichworth synopsis, week 4

Production has now been underway for four weeks at about 80% capacity due to a combination of:

- general newness, unfamiliarity and impaired communication within and between sites
- electrical circuit-breakers tripping occasionally, but unpredictably
- limited access to, and unfamiliarity with, a new enterprise resource planning (ERP) system
- limitations in storage capacity (components in and products awaiting despatch)
- limitations in spray-painting capacity

Factory staff morale is good and a 'pioneering spirit' prevails. In addition to fixed accommodation, five office staff are being accommodated temporarily in an adjacent portacabin ahead of the relocation of their departments. In order not to compromise new IT installation (part of Project 2.2), there are currently no networked connections between any Lichworth devices and systems. Staff are being reimbursed to use their own mobile phones and are sharing 15 stand-alone Windows PCs:

- Factory (8)
- Warehouse (2)
- Security lodge (1)
- Portacabin (4)

Each PC has internet access, email and a wired A4 domestic colour printer. Production control systems are not impacted, nor is security's CCTV management system, as these are ring-fenced bespoke systems.

As part of the relocation, a new ERP system was introduced to streamline Whiteline's production capabilities and provide back-office tools for scheduling, cost-tracking, timesheet bookings and expenditure. It was decided that all Phase 2 projects would also use this system for progress monitoring, but the absence of networking means access is currently limited to one wired PC in the factory. Hence, it is difficult to input and extract data in a timely manner and managers are often forced to refer to non-current print-outs of project information.

Projects synopsis, week 4

2.1 Completion of the production warehouse and goods in/out facilities

(Project manager: **Morgan Chandaria**)

The warehouse is operating at about 65% capacity pending unforeseen changes to layout (due in week 8) to allow forklifts to manoeuvre more efficiently and installation of additional racking (week 10). The problem is exacerbated by having to store extra spray-painted casings as and when received from the old site (see Project 2.6). Mitigation includes relocating the storage of smaller, high-use, non-hazardous components onto the shop floor and use of the ground floor of the office building via the external roller-door for extra temporary storage. Two temporary staff have been hired until week 12 to assist with extra handling required.

2.2 Completion of fitting out and furnishing/equipping all unfinished space

(Project manager: **Phil Green**)

The factory is complete, apart from (i) investigating the ongoing circuit-breaker problem and (ii) completion of a small shop-floor office for the production manager, deputy and two hot desks (due week 6). A follow-up project will be initiated after a suitable period of full production to review effectiveness, resolve any building/equipment snags and address any process/system/people matters arising.

Work is now underway in the office building to create meeting rooms, kitchen areas, reception, a helpdesk and the product design workshop (which will occupy about half the ground floor, including the external roller-door). Phones will be wired to PCs, and PCs and printers will connect via wi-fi, so IT cabling is not required to every desk. The team is liaising with Project 2.3 about individual staff locations and equipment needs.

Miscellaneous works are ongoing around the site (eg laying tarmac, landscaping, signage, etc).

2.3 Relocation and 'short' induction of all residual staff and equipment

(Project manager: **Alastair Stewart**)

[This case study project – see descriptions below]

2.4 Recruitment and full induction of new staff to replace those not relocating

(Project manager: **Gabrielle Peters**)

Because of the numbers involved (56 vacant posts across 11 teams), HR has outsourced advertising and initial sifting and shortlisting to the company STRAWS. Advertising went live in week 3 and interviews will be conducted by HR in week 10, using the top floor of the new offices before staff begin relocation in week 11. New starters are expected to join from week 17 onwards but local pay rates in the Lichworth area are about 8% higher than the old site, which could present some recruitment shortfalls.

2.5 Commissioning of a new HR and payroll system

(Project manager: **TBC**) (not yet started)

A new off-the-shelf HR and payroll system will offer enhanced staff records and payroll processing, improved system security and processing speeds, plus data compatibility with current Sparta systems. HR and payroll will continue to use their current systems (simply by shifting the existing server) until this is available. The design of data structures and relationships is underway and the supplier advises that migration of live data into the new system will be straightforward and can usually be completed and tested over a weekend.

2.6 Commissioning of a second spray-painting facility

(Project manager: **TBC**) (not yet started)

While the refurbished (ex-motorcycle) Lichworth paint facilities are reasonable and safe, they can only provide about 60% of Whiteline's currently required capacity. Continued use of facilities at the old site is more than able to make up the shortfall, but ongoing transportation costs are mounting and temporary storage of painted casings in the ground floor of the new office building is problematic. Storage must cease by week 11 to allow refitting of the offices, and the old site must be vacated by week 18, ahead of the expiry of that lease.

Notes

Project 2.3 synopsis, week 4

Remit

2.3.1 Implement the timely and efficient relocation of 131 residual staff and equipment to Lichworth as per agreed plans and schedules

2.3.2 Ensure each new desk 'slot' is good-to-go in terms of newly purchased or transferred equipment/facilities and access/passwords

2.3.3 Ensure communal facilities (eg printers, meeting rooms, video conferencing, kitchen areas, toilets, etc) are available and operational in a timely manner

2.3.4 Ensure a similar level of provision and readiness for the 56 new recruits joining at Lichworth

2.3.5 Prepare and deliver induction training as necessary for existing staff at 2.3.1

2.3.6 Liaise closely with dependent project teams and external contractors as necessary

2.3.7 Report progress and flag new or changed risks/issues as and when appropriate

2.3.8 Conduct a post-relocation review by week 26 to gauge staff satisfaction, operational efficiency and any outstanding issues

Facilities

Office, top floor (81 staff + equipment)	Specification	Staff	Existing	New
CEO and directors	Adjacent offices	6	6	–
PAs to directors	Open plan, near directors	4	4	–
Admin	Open plan	29	22	7
HR	Open plan	15	9	6
Finance	Open plan	7	5	2
Procurement and contracts	Open plan	8	6	2
Payroll	Open plan	8	4	4
Legal and intellectual property	Open plan	4	3	1
Spare/hot desks (4)	Open plan	–	–	–
Board/presentation room (55" screen) (1)	Seats 20	–	–	–
Large meeting rooms (46" screens) (3)	Seats 8	–	–	–
Small meeting rooms (3)	Seats 4	–	–	–
Break room/kitchen (1)	Café seating for 24	–	–	–
Toilets	As per plan	–	–	–
Office, ground floor (94 staff + equipment)				
Reception/switchboard	Reception	8	3	5
Product design	Workshop	34	27	7
Customer helpdesk (8:00am–6:00pm)	Soundproofed room	25	13	12
Tech authors	Open plan	9	6	3
IT support and webmaster	Open plan	13	6	7
Quality assurance	Open plan	5	5	–
Spare/hot desks (3)	Open plan	–	–	–
Small meeting rooms (3)	Seats 4	–	–	–
Secure IT server and storage room (1)	10m², aircon and racking	–	–	–
Break room/kitchen (1)	Café seating for 20	–	–	–
Toilets	As per plan	–	–	–
Production (12 staff + equipment)				
Painters	Temporarily staffing old facilities but slots are available for them to rejoin their relocated teams when ready	7	7	–
Receipt and despatch		3	3	–
Facilities		2	2	–
Totals		**187**	**131**	**56**

Project team

Name	Regular role	Project role
(Will Rome)*	(Operations Director)	(Phase 2 sponsor)
Alastair Stewart	Authoring Manager	Project manager: planning, budget, reporting, risks and mitigation
Ayesha Abidi*	IT Manager	Deputy project manager: leading on staff 'hearts and minds' (also deputy project manager of Project 2.2)
Adrian Newley	Design Manager	Product design workshop move sub-plan and product design team liaison
Gabrielle Peters	HR Manager	Staffing/union matters, terms and conditions, etc (also project manager of Project 2.4)
Toni Banks	Admin Manager	Communications
Shani Patel*	Facilities	Project support to Alastair, liaison into facilities team
Luca Campanaro*	Product design (new graduate)	Sub-project support to Adrian

* Located at Lichworth

Project budget

Project expenditure is budgeted at £265,280 plus allowance for internal staff costs. All new shared IT equipment (large screens, printers, routers, etc) is being provided and funded by Project 2.2.

Item	Budget	Assumptions
Office furniture	£93,280	169 staff plus 7 hot desks x £530. Directors to use recently purchased existing furniture.
Board/meeting rooms	£24,700	Meeting tables and seating for 68.
Kitchens	£7,800	White goods and other equipment. Café tables and chairs for 44.
Removal contract	£117,500	Removal of personal effects x 131. Removal of disassembled product design equipment, paint spraying rigs, miscellaneous non-office equipment and 2 de-fuelled forklifts.
Miscellaneous staff costs	£15,000	Project overtime, travel/expenses and approved (by Will) use of temps.
Contingency	£7,000	'Feelgood' items (plants, pictures, etc) to ease staff transition issues.
Project team	–	Five team members funded for 24 days' project activity. Project manager and deputy project manager funded for 30.
Relocated staff	–	Unproductive time due to relocation activities not to exceed 5.5hrs per person.

Initial project activities

- Will, Ayesha, Shani, Luca and John Kelly (Production Manager) are sharing a portacabin that has been leased until week 17. Alastair, Adrian, Gabrielle and Toni have yet to relocate. They are able to communicate by email, mobile phone and a project WhatsApp group, but Lichworth-based staff have no remote access to legacy systems at the old site; conversely, staff based there have no access to Lichworth's new ERP system.

- A project start-up meeting was held in week 1, at which Alastair presented a draft schedule and assigned responsibilities to the team (see above), of which staff 'hearts and minds' (Ayesha) was flagged as a priority.

- All managers of 'office' teams visited Lichworth in week 3 and, regardless of ongoing building work, were pleased with the general condition and space. However, some were surprised by the proposed open-plan layout, from which it became clear that messages to staff have been mixed or absent. As a result, social media is now a hotbed of rumours, myths and conflicting messages, as well as some justifiable concerns.

- Alastair Stewart has just submitted his first monthly report in advance of the team progress due in week 5.

Notes

Extract from monthly report #1 for Project 2.3

Notes

Overview

This is the first monthly report for Project 2.3. The project has had a slower than intended start, due partly to the inefficiencies of having team members dispersed across both sites. However, there are no significant issues, threats to deliverables/deadlines or changes to risks. The team is starting to gel, roles have been assigned and initial staff consultations and planning activities are underway.

Project activities

1. Consult with staff due to move. Office team managers visited Lichworth last week and were shown areas under construction. There were many positive comments about space but some concerns over open plan, which I'm sure can be overcome. I've told managers to sell the plan to their staff.

2. Team and individual desk allocations. Our draft team seating plan was presented at the visit last week but not all managers were happy with locations and planned cupboard space. I explained the 'givens' (eg Finance and HR need to be at the far end so screens are not visible to passers-by) but I have some flexibility over other areas. I'm meeting managers again next week to resolve this.

3. Procure new furniture and equipment. I'd assumed 2.2 were doing this so no action so far. I believe lead times are about four weeks so my aim is to get our order into Myran by the end of next week.

4. Agree move dates by team. Fitting out (Project 2.2) is currently on schedule so we need to address (1)–(3), with the onus on office managers to get on board and communicate clearly and assertively with any reluctant staff.

5. Arrange removals. Purchasing have placed a contract with a local company, Pickworth, which is just within budget. We have tentative dates logged but the supplier is now pressing for confirmation.

Issues

1. Ayesha (Deputy Project Manager) is subject to conflicting commitments that are impacting on the attention she can give to this project, especially 'hearts and minds' chats with staff. She is also deputy project manager of Project 2.2 (office refitting) and manages the IT support team which itself is currently under pressure from supporting business as usual at both sites, plus additional tasks associated with the relocation.

2. The lack of wi-fi at Lichworth is problematic as the whole business has evolved to expect electronic access to files, data input/output, email and other communications as a given. It is also limiting everyone's access to the new ERP system. Although we know IT are overstretched, could some extra effort be diverted into getting this set up – I assume once there is a reliable signal across the site, staff can use the same login details and methods as they did at the old site?

The project progress meeting next week at Lichworth will be an opportunity to get everyone updated and agree the right way forward.

Alastair Stewart

> **Toni's project chat**

Adrian
Anyone seen an agenda for next week's team meeting?

Gabrielle
No, but he badly needs to get things moving
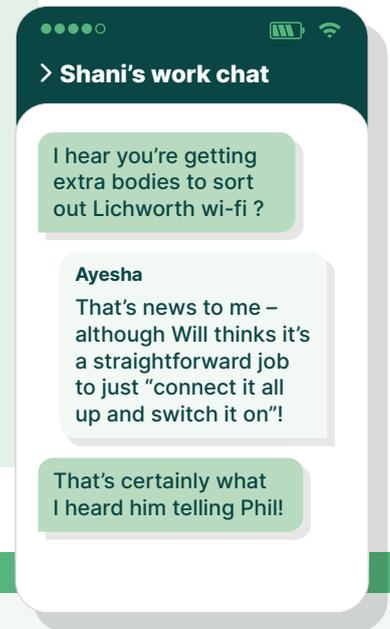
Adrian
Don't hold your breath

Week 5

Alastair

Thanks for the report. I was reassured by your initial remarks about progress but subsequent comments did not always seem to support this. I think we need more clarity in the form of project documentation (schedule, spend, risks, etc). As I stressed when I appointed you, the project budget is clearly important, but of far greater significance to the board is that you deliver on office relocation to schedule and with minimal impact to staff wellbeing and business continuity. I do hear mutterings about unhappy and uninformed staff, so that needs sorting.

That said, I do note your comments about divisions in team location and the conflicting calls on Ayesha's time. She knows we are looking separately at boosting IT capacity, possibly through early recruitment to overlap with some staff who will be leaving as the old site closes. However, do try to make use of her as she has a lot of valuable project management experience that will be helpful to you.

Please respond with an email by the end of this week, including a brief summary of how your meetings with the office team managers and your first team meeting at Lichworth went.

Regards,

Will

> **Shani's work chat**

I hear you're getting extra bodies to sort out Lichworth wi-fi ?

Ayesha
That's news to me – although Will thinks it's a straightforward job to just "connect it all up and switch it on"!

That's certainly what I heard him telling Phil!

Notes

From: alastair.stewart@whiteline.sparta.co.uk

To: will.rome@whiteline.sparta.co.uk

Sent: Week 5

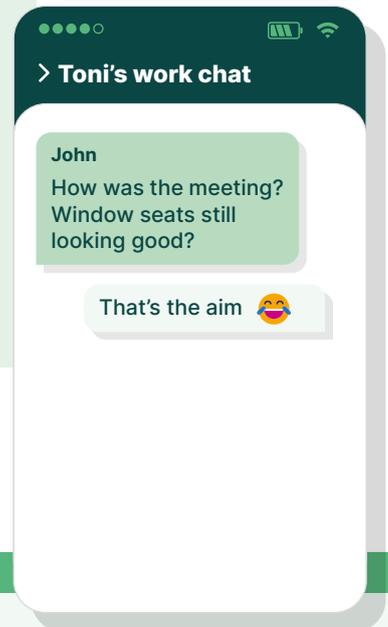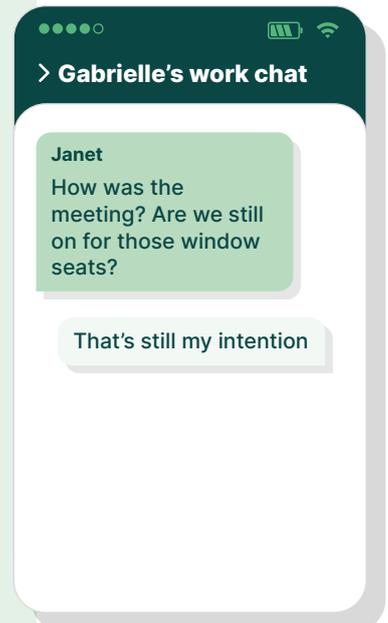Subject: Re: Your monthly report @ Wk 4

Hello Will

The team meeting went pretty well, although some curious conflicts of interest quickly emerged, particularly from Gabrielle and Toni who seem torn between the project interests and those of their teams – but I think they now both understand that the project must take priority.

We all talked about the dependencies between the five activities in the monthly report and the need for them to not just brief their teams but get them on board with our proposals. Ayesha was leading this but we can all see how busy she is with everything else, so everyone seemed to accept that. Adrian was fairly quiet: he's leading the product design workshop as a separate sub-project and reports that everything is going to plan.

Regarding project docs, you'll be aware I can't access ERP here, but even those at Lichworth have only limited access. This makes getting live project data and budget tracking particularly difficult – although I know we're underspent by a few days on staff time. I've been keeping docs in the cloud on Dropbox and have sent you an invite email to access those, so you should be able to see the risk register and project Gantt chart.

Regards,

Alastair

> Gabrielle's work chat

Janet
How was the meeting? Are we still on for those window seats?

That's still my intention

> Toni's work chat

John
How was the meeting? Window seats still looking good?

That's the aim 😂

Notes

Extract from Project 2.3 risk register

ID	Description	Likelihood	Impact	Mitigation actions	Contingent action
1	Sub-contractor or supplier delays	M	H	Include damages for late delivery in contracts.	Escalate to project sponsor and contracts manager. Implement late clauses.
2	Dependent project delivery deadlines missed	M	H	Project sponsor briefs project managers on key dependencies. Project managers routinely report and coordinate activities.	TBC
3	Conflicting staff priorities	M	M	TBC	TBC
4	Project schedule is not clearly defined or understood	L	M	Brief staff so they understand the plan, reducing the likelihood of missed tasks or deadlines.	Share the plan and go through upcoming tasks at project progress meetings.
5	Hygiene factors at new offices (space, layout, noise, etc)	L	M	Line managers prepped, staff briefed, ongoing comms. Contingency fund for 'feelgood' items (e.g. plants, pictures).	TBC

Notes

Extract from Project 2.3 Gantt chart

Project 2.3 Relocation

ACTIVITY	Related project	External supplier	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
Consult with affected staff			█	█	█	█															
Order new furniture		Myran					█														
Agree desk allocations						█	█														
Confirm removals booking	2.2	Pickworth							█												
Site wi-fi active	2.2										█										
Prepare top floor and reception	2.4					█	█	█	█	█	█										
Recruitment interviews (top floor)												█									
Relocate top floor	2.1	Pickworth											█	█							
Clear stored stock from ground	2.2														█	█					
Prepare product design workspace														█	█	█					
Relocate product design workspace	2.2	Pickworth															█				
Prepare remainder of ground floor															█	█	█				
Relocate ground floor		Pickworth																█			
Portacabin lease ends		Fosters																	█		
Clear, inspect and vacate old site																				█	
Old site lease ends																					█

Notes

Week 6

Extract from Alastair's notebook

Office managers' meeting (week 6)

Seating

HR (15), Finance (7) and Payroll (8) team seats <u>must</u> be at far end, so screens not visible to passers-by. Suggested we arrange others in rows across office so all teams get some window seats.

All team managers/leaders OK with this except Gabrielle whose team "must have natural light" and minimal noise (raised eyebrows at this, esp from Toni!). Agreed to investigate 'daylight' uplighters.

Downstairs managers much more relaxed as layout, team sizes and functions tend to lead to obvious seating locations.
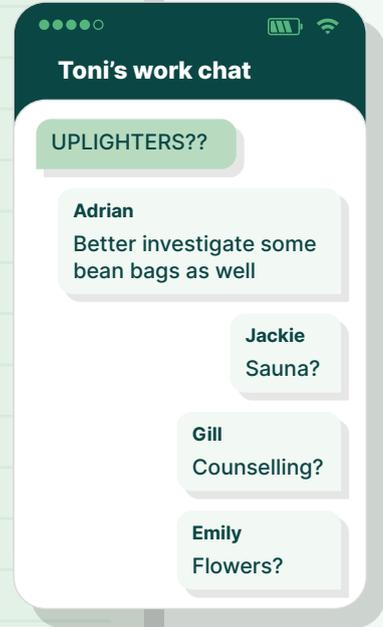
Open plan

Surprised open plan decision not widely understood and disappointed managers on project team have not been spreading the word and winning people over. Ayesha will try to find time to walk the floors, chat and try to mend some fences with affected staff.

Move dates

Project 2.2 aiming to complete top floor (plus reception) first and is currently on target. Downstairs managers OK with that.

Will discuss details with upstairs managers ASAP. Adrian reports product design workshop sub-project all on target for a planned move in week 15.

Toni's work chat

UPLIGHTERS??

Adrian
Better investigate some bean bags as well

Jackie
Sauna?

Gill
Counselling?

Emily
Flowers?

Toni's work chat

John
Any more desk news?

I have a cunning plan!

From: toni.banks@whiteline.sparta.co.uk

To: alastair.stewart@whiteline.sparta.co.uk

Sent: Week 6

Subject: Move into portacabin

Hi Alastair

I'm hearing that Lichworth could do with some admin support ahead of the formal move of the team, and I believe there will be two spare desks in the portacabin once John moves into the factory next week.

I'd like to suggest that Musa and I take up residence then, leaving Roma in charge of things at this end. We can bring our own computers and essential kit in our cars, and then shift the rest during the team move.

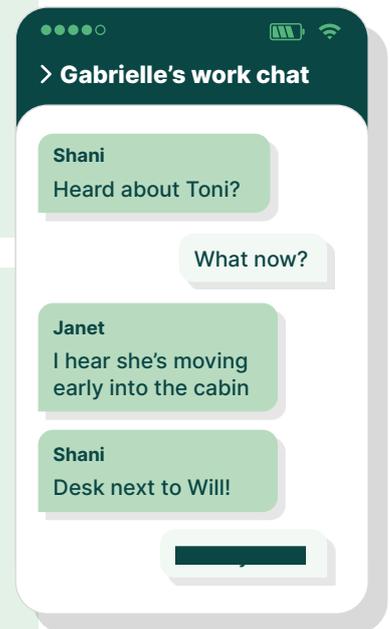Christopher is fine with this so can I presume it's OK with you?

Toni

From: gabrielle.peters@whiteline.sparta.co.uk

To: christopher.white@whiteline.sparta.co.uk

Sent: Week 6

Subject: Toni moving?

Hi Chris

I've heard that Toni may be trying to move across early, despite what was agreed in our last meeting. If possible, I'd like to suggest that I move instead to be closer to scene of 100+ upcoming interviews.

Best,

Gabrielle

> **Gabrielle's work chat**

Shani
Heard about Toni?

What now?

Janet
I hear she's moving early into the cabin

Shani
Desk next to Will!

Notes

Notes

From:	christopher.white@whiteline.sparta.co.uk
To:	gabrielle.peters@whiteline.sparta.co.uk; toni.banks@whiteline.sparta.co.uk
Sent:	Week 6
Subject:	Re: Toni moving?

Gabrielle & Toni

I am disappointed to see clear signs of manoeuvring here, despite discussions we've had in the past about your rivalries getting in the way of the best interests of the business. It needs to stop right now.

Gabrielle, interview docs and queries are all coming here, so moving away from your team and its networked HR system to what is currently an IT wilderness seems highly counterproductive.

Toni, I did not say I was fine with you moving. However, I do agree that some advance admin presence would be useful so I've suggested to Alastair that Musa does move early to provide support.

Christopher

From:	christopher.white@whiteline.sparta.co.uk
To:	alastair.stewart@whiteline.sparta.co.uk
Cc:	will.rome@whiteline.sparta.co.uk
Sent:	Week 6
Subject:	Gabrielle & Toni

Hi Alastair

I hear the children have been bickering again. As project manager you have my authority to bang heads but, if there is a desk available, please move Musa (but not Toni) across to provide admin support for Lichworth.

Regards,

Chris

From:	alastair.stewart@whiteline.sparta.co.uk
To:	will.rome@whiteline.sparta.co.uk
Sent:	Week 6
Subject:	Furniture
⚠	This message was sent with High Importance

Hello Will

Could we speak urgently about furniture please? The four-week lead time I had presumed is incorrect and our supplier (Myran) is currently quoting six to seven weeks. I have a full inventory of requirements all ready to go, so our options appear to be as follows:

1. Delay all moves by two to three weeks
2. Investigate alternative sources of supply
3. Move across some or all existing furniture, on either a temporary or a permanent basis

I'm sorry about this but I'm ready to come over to discuss at your convenience and put in whatever effort is required to resolve matters.

Regards,
Alastair

From:	will.rome@whiteline.sparta.co.uk
To:	alastair.stewart@whiteline.sparta.co.uk
Sent:	Week 6
Subject:	Re: Furniture
⚠	This message was sent with High Importance

Alastair

That's a serious problem and, in fact, the situation is even worse. Because of a fresh commitment to Sparta, Nicola needs to bring the directors' move forward by one week. This must also include PAs, reception, M&F toilets and at least one meeting room. So, summarising your news and my news:

• The whole upstairs move is currently scheduled for weeks 11–12
• You were planning to order at the end of week 5 with anticipated delivery in week 9/10
• We're now in week 6 and we need to bring the directors' (etc) move forward to week 10
• If you order now from Myran, delivery should be in week 12/13

I'm going to keep this between us for now but I will need costed options for resolving both problems on my desk by tomorrow night.

I want Ayesha fully involved in this, partly for her project management experience and also in her capacity as deputy project manager of the refit project (check ASAP that offices, reception and general access can be brought forward by a week).

BTW, directors were supposed to relocate their existing desks. Might help a bit?

Will

From:	alastair.stewart@whiteline.sparta.co.uk
To:	will.rome@whiteline.sparta.co.uk
Sent:	Week 6
Subject:	Re: Re: Furniture

Hello Will

Quick initial response. Ayesha has spoken to contractors and they could prepare necessary areas but it will require additional plumbing and electrical effort plus some overtime to allow for plaster/paint drying and then given second coats overnight. Flooring is carpet tiles and can be laid as required, so you'll get everything Nicola has asked for, except reception won't be fully finished but will look presentable. Variation cost to the refit contract will be around £6.5k. I've looked at existing PAs' furniture and it all matches and looks quite decent but is teak rather than oak (new buy spec). As the desks and cupboards are a little larger than proposed new ones, the PAs are all happy to move them across.

Please don't forget the upstairs refit is scheduled to complete in week 9 and the whole floor is earmarked for interviews in week 10 – Gabrielle has 56 vacancies, so over 100 interviews – before staff occupy in week 11. She could decamp to a local hotel but she thinks that would hit her budget by around £5k. So costs of moving directors early are £5.6k (refit), £5k (interviewing) and £1.2k (additional removals), totalling £11.8k, minus potential savings of £2,720 (4 x £530) if PAs' furniture is not replaced later on.

Regards,

Alastair

Notes

Revised relocation and furniture options

		Options	Supplier	Costs v budget	Implications
1	Move as planned Week 11–12 (up) Week 15–16 (down)	Relocate the best 70% of existing furniture (allowing for leavers) and consider replacements in next FY. Buy new furniture for recruits starting in week 17.	Myran	£65k furniture savings £12k removal costs	Extra disruption before/after move, furniture in mixed condition and colours, old desks are 20cm longer than planned, possible extra replacement costs in next FY.
2	Move as planned Week 11–12 (up) Week 15–16 (down)	Higher-spec furniture delivered on time but different wood to meeting rooms. +15% cost variation and 10% Myran deposit lost.	Spatles	£14k furniture costs £9.5k lost deposit	All new furniture but desks 15cm shorter than planned (so 25cm shorter than current desks).
3	Delay by one week Week 12–13 (up) Week 16–17 (down)	All new, matching furniture as specified, but from different supplier (+5% cost variation).	Saxon	£4.7k furniture costs £9.5k lost deposit	Meets staff expectations and furniture will fit planned space.
4	Delay by two weeks Week 13–14 (up) Week 17–18 (down)	All new, matching furniture as specified from preferred supplier.	Myran	On budget	Meets staff expectations, furniture fits planned space, cost = budget.
5	Hybrid Week 11–12 (up) Week 17–18 (down)	Top-floor move as planned using existing or new furniture (TBC). Ground-floor move delayed, but with new furniture as per plan and budget.	TBC	TBC	TBC

Notes

Notes

From:	alastair.stewart@whiteline.sparta.co.uk
To:	will.rome@whiteline.sparta.co.uk
Cc:	ayesha.abidi@whiteline.sparta.co.uk
Sent:	Week 6
Subject:	Furniture costs & options

Hello Will

Revised relocation and furniture options attached as promised, based on the following assumptions:

1. Directors, PAs and reception relocate in week 10 rather than week 11, all using existing furniture.
2. Interviews planned for week 10 decamp to a local hotel (candidate letters to be sent in week 8).
3. Building will be ready for other staff to occupy in week 11 (upstairs) and week 15 (downstairs).
4. Shared facilities (kitchens, toilets, meeting rooms, printers, etc) will also be ready in weeks 11 and 15.

Two other factors that may help in a small way:

1. We're due an estimated supplementary income of around £5k from a local merchant who will clear all buildings and sell-on the remaining furniture (~180 sets) in week 18 after the site has been evacuated. However, this could flip into a clearance cost if we now bring a lot of the existing furniture with us.
2. I now have today's ERP data showing a project staff underspend of £4.7k due to our slower than planned start and Ayesha's reduced input because of other commitments. I presume it would be possible to offset this saving against additional furniture costs?

Regards,

Alastair

Notes

From: ayesha.abidi@whiteline.sparta.co.uk

To: alastair.stewart@whiteline.sparta.co.uk

Sent: Week 6

Subject: Howzitgoing?

Hi Alastair

How's it going? Thought I'd email as I have a rare quiet moment. Has Will made decisions on move dates and furniture options yet? If he doesn't do it soon, you'll have to re-estimate all your estimates!

I'm surprised he hasn't picked up on your wi-fi suggestion – I agree that getting it set up would make a big difference to Lichworth but I'm reluctant to create extra work for the IT team (and me) by pulling it forward from week 9.

I do feel bad about not being more involved in our project but I know you appreciate the demands of IT support and the refit project. Could I just check where we are on documentation? I've seen various individual files on Dropbox but I'm not sure I've come across an up-to-date overall 'Project Management Plan' that I could pick up and run with in an emergency. Any chance of a chat sometime soon?

Best wishes,

Ayesha

From: alastair.stewart@whiteline.sparta.co.uk

To: ayesha.abidi@whiteline.sparta.co.uk

Sent: Week 6

Subject: Re: Howzitgoing?

Hi Ayesha

You must be reading my mind! I'm conscious that I'm not quite as on top of things as I'd like to be, and I do think more input from you would have helped. But I have been assembling a PMP in the background and I now probably have a reasonable draft that would benefit from a perusal and feedback from you.

I see tomorrow morning's training budget meeting has been postponed, so how about we use that slot for a catch-up? I'll come across for 9:45 unless I hear differently.

Regards,

Alastair

From:	christopher.white@whiteline.sparta.co.uk
To:	will.rome@whiteline.sparta.co.uk
Sent:	Week 6
Subject:	Alastair Stewart
⚠	This message was sent with High Importance

Will

I have received a call from Alastair – turns out the rumours were true and he has been headhunted.

He would have too much visibility of our core operations and financial information to allow him to work out his notice period – especially given where he is moving to – they are hardly known for their ethical recruitment practices!

I appreciate that this will have an impact on the projects, but I have a great candidate that I really think could hit the ground running – will give you a call at 10 to discuss.

Regards,

Chris

Will

Alastair phoned.

He has accepted a role with a competitor.

HR have put him on leave, starting immediately.

Luca (09:20)

Candidate role

Following Alastair's departure from the project, it has become clear that he will not be returning. You have been brought in by Will Rome to manage this project.

Notes

We are the only chartered membership organisation for the project profession