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Project Planning in 4 slides

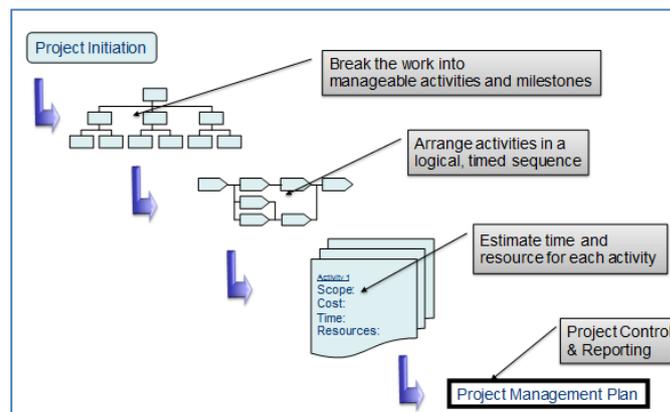
Project Planning in 4 slides

“Plans are nothing, planning is everything” – Dwight D Eisenhower

Planning a Project

I was recently asked to write some notes for a client who would be delivering some project management training. There were only four PowerPoint slides in the session which was also supported by several practical exercises to help reinforce the learning. This article summarises the points I’d want to get across in any session on planning.

Slide 1: Planning Overview

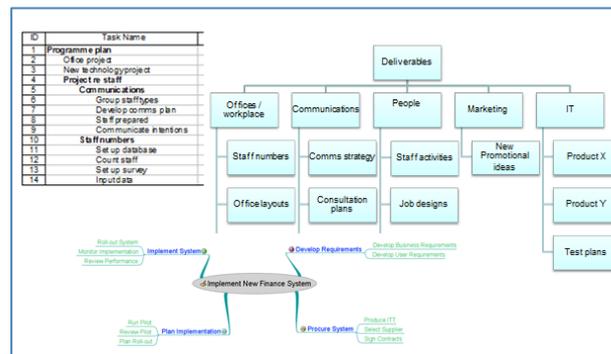


There is always a range of levels at which you can plan. During the Initiation Stage of a project, you are planning, but at a very high level. As the project progresses into the Planning Stage, the level of detail increases and additional tools and techniques can be used to help.

Key deliverables and milestones can be identified from the Project Definition. These need to be defined in terms of when they must happen and if there are any inter-dependencies. Finally, detailed activities can be planned, together with the specific resources required to achieve them.

What chunks of work need to be done?

Slide 2: Work Breakdown Structure



In any project, the work to be done can be broken into a series of “work packages”, each of which can be delegated to members of the team. A Work Breakdown Structure (WBS) enables you to decide what the work packages should be, but tells you nothing about when they need to be done.

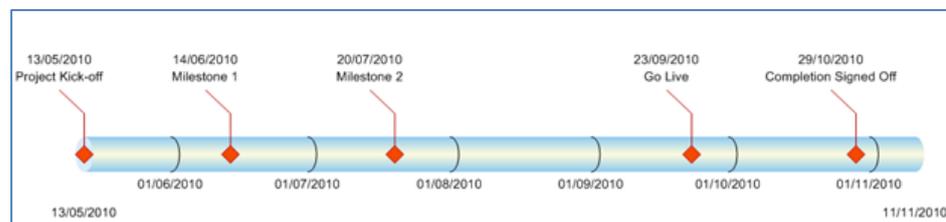
It is usually a hierarchical set of tasks, either shown as a list, or tree diagram, or a mindmap. It could be a breakdown of the deliverables and would then be called a Product Breakdown Structure.

Level 1 is the project itself. The second level could be the project’s main lifecycle stages. Below that are the more detailed packages of work.

Software commonly available: MS Office (Org. Chart), MS Visio

Hit your Milestones

Slide 3: Milestone Planning



Milestones are important, defined, events which either have to start at a particular time, or have to end at a particular time. Often, they will be associated with the completion of major deliverables, or key approval points.

Therefore, they can be used to produce an overall view of key project timescales. This might be as simple as a Milestone Chart where you list the milestones, who is responsible for achieving them and their planned and actual

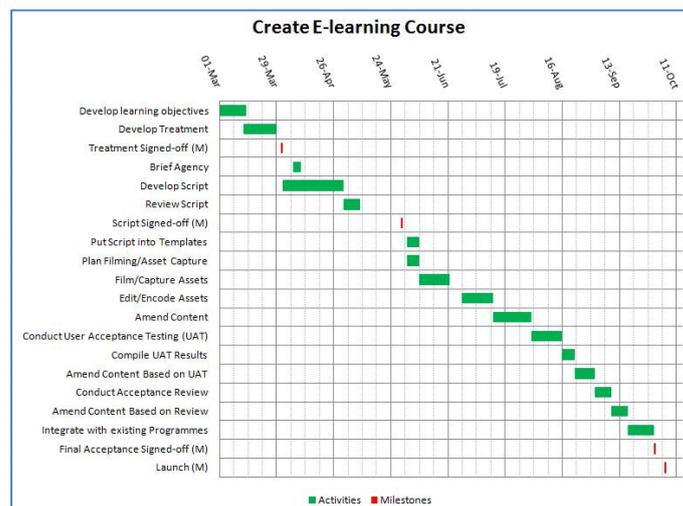
dates. This provides a fairly simple way of reporting progress to Sponsors and senior managers. You can use colour-coding to highlight progress and concerns.

Milestones have “zero duration” and should be expressed in the form: Noun plus Verb (past tense); i.e. “stuff done”.

Software commonly available: MS Office (ppt, xls), MS Visio (Timeline)

When will the work get done?

Slide 4: Gantt Chart



Many projects will need a Gantt (or Bar) Chart to show what activities need to be done and when they need to be done. This tool was developed by Henry Gantt for major US construction projects e.g. Hoover Dam.

The activities are listed (from the Work Breakdown Structure) and bars are drawn to represent the start, duration and end times for each activity. Any Milestones would appear as points on the chart with zero duration. For many relatively simple projects, Microsoft Excel is a suitable tool to use to produce a Bar Chart.

For most projects you will need to plan from “End to Start” – you know the deadline and therefore all the work has to be fitted in to achieve that date. You can use the Milestones to break it down into more manageable time-slots and fill the detail in between the Milestones.

Some activities may have a dependency on other activities. For example, you can’t “review the pilot” until you have “run the pilot”. In many cases, the dependency will be like this: one activity can’t start until another one has ended. There may be cases though where activities have to start in parallel, or finish at the same time.

Share the plan with appropriate stakeholders so they understand what will happen and when. This is particularly important if you are working with external partners

and suppliers. They need to know how their work fits with other people's and the impact of any slippage.

Some of the practical challenges in creating a Gantt Chart...

- Resources are often scarce (people, money, equipment, facilities). You may need the same resource to work on activities that could be done in parallel. Consider:
- What resources do you need in order to carry out all the tasks in the Work Breakdown Structure? (identify people, money, facilities)
- When are those resources available? (e.g. think about part-time staff, or job-shares)
- Where are those resources available?
- What resource or activity conflicts are there? (e.g. any other projects using the same resources)
- What influence do Stakeholders have on resource availability? (who can help you free-up resources)
- Are there any "calendar" constraints (e.g. Summer or Xmas holidays, half-term breaks)

Contingency: historically, Project Managers and planners would add contingency to each activity which "pads" them out to allow for problems and slippage. The problem with this is that if you plan in contingency, most people will take it and the project will potentially take longer than it needs to. Current thinking is to have a "buffer" which is added to the end of the project, from which contingency can be "drawn down", if needed.

Critical Path: The longest time and shortest path for completion of activities from start to end of a project. Any delay on this path will delay the whole project because it "stacks up" all the activities that have dependencies on each other. Other activities, not on the Critical Path, can be done in parallel, but will eventually also become "critical" if they run late.

Finalising your Project Gantt Chart will usually require some "juggling" of activities and resources to come up with a workable plan. And, you need to be realistic about your time estimates. Don't forget to take account of holiday periods such as Christmas and mid-Summer when there may be several weeks when no staff resources are available or Project Boards don't meet to make decisions and give approvals. Although a Gantt Chart looks like a very "rational" tool, there's a lot of intuition and negotiation required to come up with something viable.

Software commonly available: MS Excel (probably adequate for 90% of projects), MS Visio also has a simple Gantt Chart template

For more complex projects, Microsoft Project (MSP) is often the preferred software tool. You may be involved in projects where other people are using MSP so it's helpful to understand how to interpret these project plans. Remember, MS Project is just another tool. Just because you can use MS Project it doesn't make you a Project Manager, any more than being able to use MS Excel makes you an Accountant.

Key points to summarise

It's very easy to lead people down the route of filling in templates and using particular project tools. Neither templates nor tools replace common sense and different projects are likely to require different approaches. A more complex project, carried out in a "mature" Project Management environment can make use of more sophisticated tools. However, in many organisations, Project Management "maturity" is quite low and there are often significant cultural barriers to be overcome. Effective Project Managers scale the approach accordingly. There is definitely no "one size fits all" solution.

I'll end by reminding you these notes were written to help a trainer but I believe people really only learn about Project Management by doing it. So, any training events must build in practical work to reinforce the learning, either by using case studies, or preferably by allowing people to work on their own, real, projects.

Our track record

Our consultants have been helping organisations to improve their Project Management capability for more than two decades. We run project skills workshops, coach Project Managers and teams and help develop in-house PMO expertise.

We are not wedded to a particular methodology. We help clients identify their improvement goals and then develop an approach to achieve these; invariably ensuring their people develop the skills to make further improvements themselves.

Please contact us for more information about how we can help you to manage and improve your projects.

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