Planning 3: Practical Project Planning

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Introductions

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The “Planning” Series

1: Strategy & Vision	5 September
2: Making a Business Plan	12 September
3: Practical Project Planning	19 September

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Today's Content

1. Why is planning important and where does it sit within my overall project?
2. How should I initiate a project?
3. How should I plan my project?

Importance of Project Planning

Project Planning includes everything you have to do to maximise the chance that your project is a success.

Although, even with good planning, some projects will still fail

Project planning establish the steps required to:

- define your project objectives and what you aim to deliver
- clarify the scope of what needs to be done (and what doesn't!)
- define the project structure and reporting
- develop the schedule of tasks (including resources)
- assess risks

Project Planning is a Process

"Multiple failings have led to delays and cost overruns" – Audit Scotland Report

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Project Planning "Buzz Words"

SCRUM

PRINCE 2

Resource Levelling

BE "AGILE"

Work Breakdown Structures

GANTT Charts

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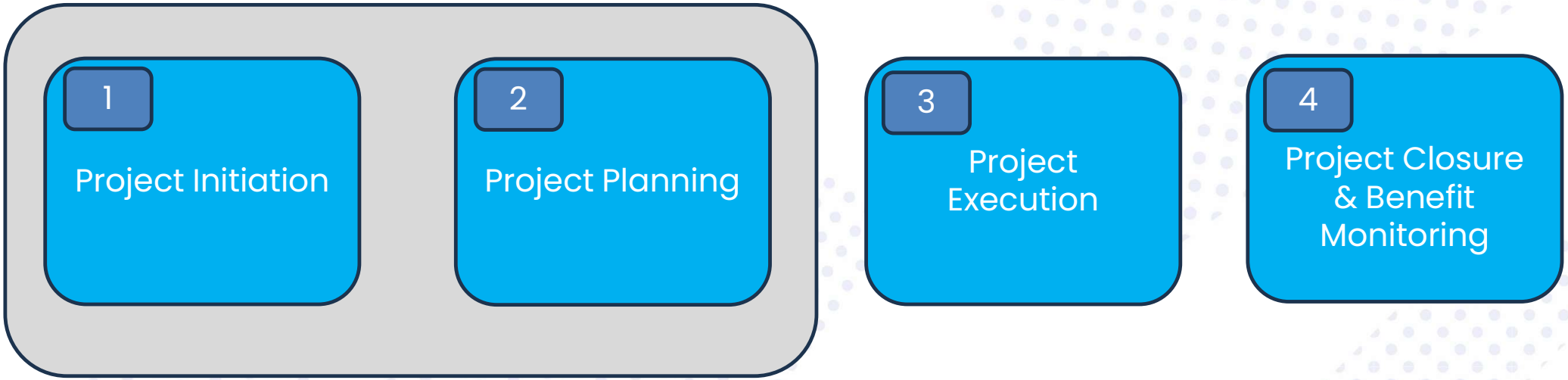
A Project Lifecycle

A project can be described as having 4 main phases as shown below.



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Project Initiation

A project charter or a project initiation document (PID) should be produced before the project starts that defines the project and what it aims to deliver – in effect this is pre-planning

- Objectives & Success Criteria
- Outcomes to be measured
- Scope
- Assumptions
- Governance (including change management)
- Budget & Expected Timeline

In the next couple of slides we will explore some of these based on a real-life example of implementing a new website for a charity

Project Initiation

Objective & Success Criteria

- Reason for project – contract with existing website provider ends at end May 2023 and more cost effective to move to in-house solution
- Constraint – new website must be in place by 1 June, as existing solution will not work from then
- **Objective – Develop and implement a new website (at least replicating current functionality) by 31 May 2023**

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Scope

- Given time constraint, scope control is crucial
- Scope includes integrating with current CRM system to create requests for sessions from new customers (using a standard interface)
- No new website functionality included at this stage as this could create a risk to delivery, although all existing web pages would be reviewed and updated where necessary
- Also requires new "look and feel" to be defined and consistently used across the website

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Project Initiation

Governance

- Existing business manager to act as Project Manager
- Project Steering Group to be setup with weekly meetings to monitor progress, address issues and consider change requests
- Progress to be reported to Trustee board as part of regular reporting

Outcomes to be Measured

- Website functionality – **all required pages** have content that has been signed-off
- User experience – website is able to support 20 concurrent users and the page refresh time is less than 2 seconds (*numbers here are simply examples*)
- Integration - website allows customers to submit requests for sessions, with **all information** being passed into the CRM system

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Measuring Outcomes

In my experience, organisations often find it difficult to identify ways to appropriately measure outcomes, in particular where this relates to human behaviour/emotion

When considering how to **measure outcomes**, think about:

- Are there any single measures that are directly related to what the objective aims to achieve? If yes, how easy is it to capture the data to determine this?
- Are there other things that you are doing (or someone else is doing) that could have an impact on the measure?
- In all cases, what is the starting point so that you can track progress against (benchmarking)?

e.g.
reduce social isolation

increase confidence in using IT

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Project Planning Aspects

Project planning involves many aspects – we are going to discuss the 5 shown here

- Structure & Governance
- Reporting & Communication
- Project Schedule
- RAID Log
- Testing & Acceptance

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Project Structure & Governance

There is no one-size-fits-all option – choose the structure that is most appropriate to the scale and complexity of your project.

Also need to consider who the stakeholders are and what they want to know and when

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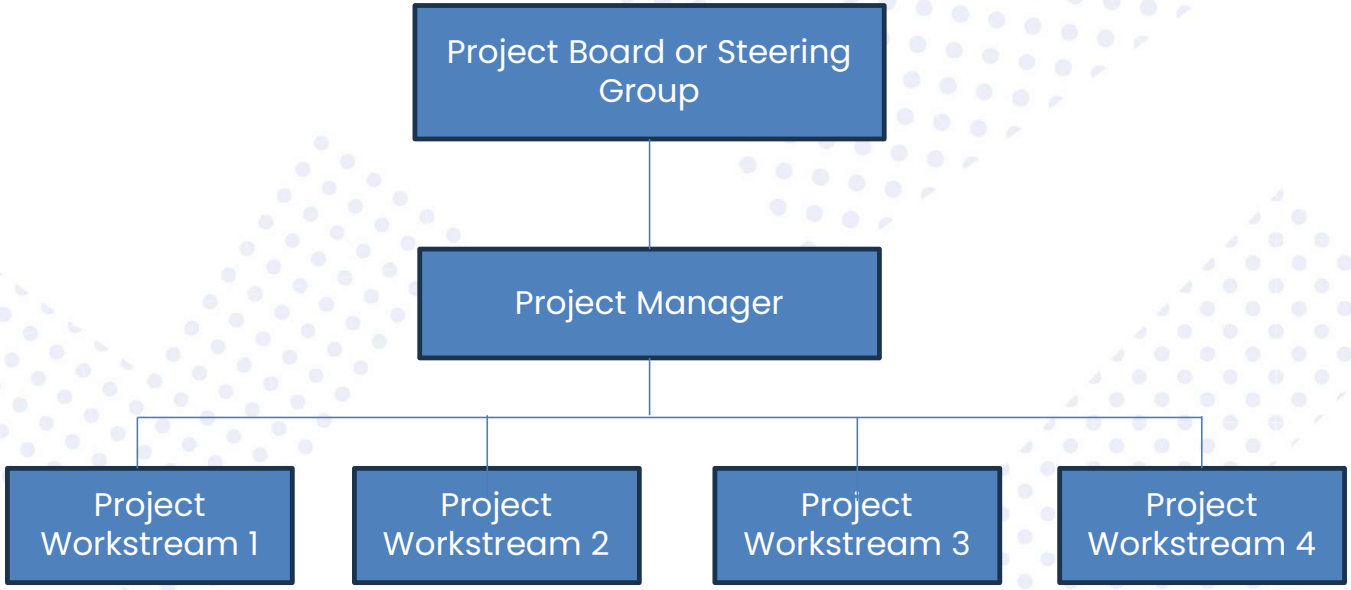
- Project Board (or Steering Group) is the senior governance body for the project. For large projects, this may have sub-groups – need to define responsibilities of each of these
- Establish workstreams for each set of activities that naturally sit together – each workstream should have a workstream lead who will report on progress to the project manager



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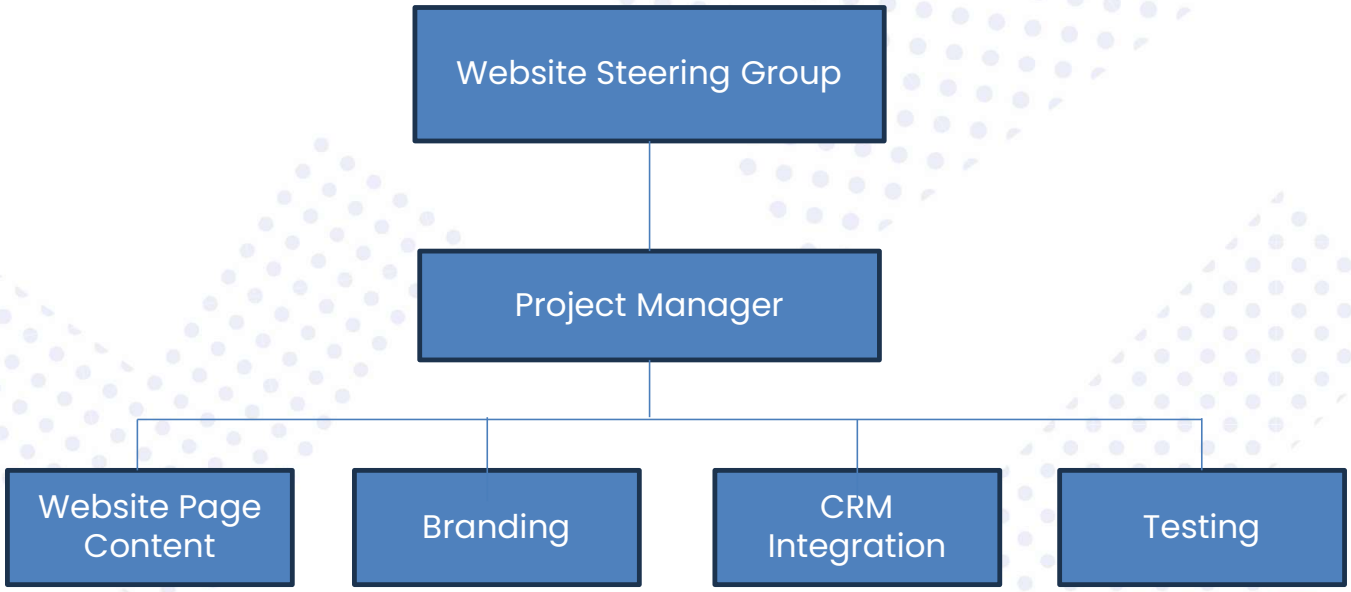
Project Structure & Governance

For the “new website” example project, the project structure could have been setup as shown below, with the steering group being responsible for reviewing and approving change requests.



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Project Reporting & Communication

Good communication and regular reporting are the keys to project success, as everyone is kept up to date, and there should be no "surprises" – project managers hate surprises!

The project manager should be at the centre of all of this activity which typically will include:

- Workstream leads producing weekly update reports and submitting these to the project manager
- The project manager holding weekly meetings with all workstream leads to review progress and issues
- The project manager producing regular update for the Steering Group (frequency aligned to how often the steering group meets) highlighting overall progress and clearly identifying where the steering group needs to take decisions
- Potential change requests being raised with the project manager, who will ensure that appropriate impact analysis is undertaken, together with a review of options
- The project manager will include completed change requests as part of the documentation submitted to the steering group
- Regular progress updates will be issued to all identified stakeholder groups

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Project Schedule

Often referred to as the "project plan", the schedule captures all of the tasks and activities that must be undertaken as part of the project

The Schedule needs to include ALL tasks to be undertaken, typically broken down into sections for each project workstream. For each task capture:

- Description of the task
- The deliverables from that task (this helps to avoid ambiguity about what sits where in the project)
- The planned start and end dates of the task
- The people who are responsible for delivering the task
- Any dependencies that the task has on other tasks (really important as you move into the execution phase)

Projects may be broken down into phases, with the deliverable(s) from each phase being referred to as a **Milestone**. Can be useful where projects are complex or run for a significant period of time.

The initial plan should be "**baselined**" so that any changes against the plan can be understood and monitored.

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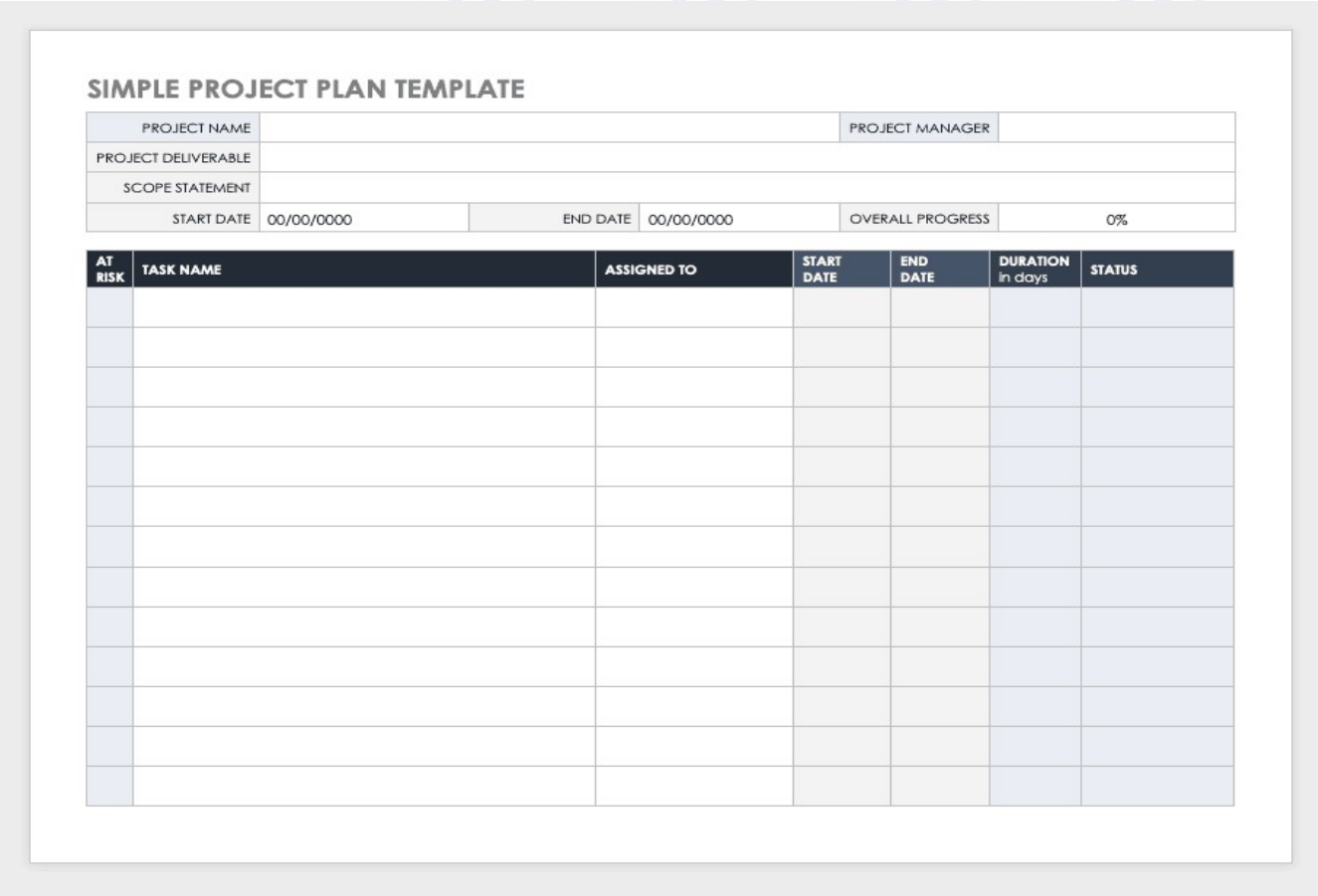
Project Schedule

Project Schedules can be very simple – normally no need to invest in specific software products and simply use tools like spreadsheets



SIMPLE PROJECT PLAN TEMPLATE

PROJECT NAME				PROJECT MANAGER	
PROJECT DELIVERABLE					
SCOPE STATEMENT					
START DATE	00/00/0000		END DATE	00/00/0000	OVERALL PROGRESS	0%

AT RISK	TASK NAME	ASSIGNED TO	START DATE	END DATE	DURATION in days	STATUS

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Project Schedule – example

Simplified example based on the new website project described earlier – dependencies allow you to identify the **Critical Path** for the project (1 – 3 and 4 – 5)

	Task Information						
						Baseline Plan	
Task ID	*Description*	*Workstream*	*Deliverables*	*Owner*	*Other Resources*	*Start Date*	*End Date*
1	Review all existing website content	Site Content	Wording changes identified	CB	AZ, CT	13-Feb	31-Mar
2	Develop new website branding	Site Content	Brand template	AS		13-Feb	24-Feb
3	Create new website pages	Site Content	Website pages	CB	AZ, CT	03-Apr	12-May
4	Develop interface with CRM system	CRM Integration	Working interface	PZ	External IT	17-Apr	12-May
5	Test website functionality and performance	Testing	Tested website	CB	AZ, CT, AS, Board	15-May	26-May

In this case, completion of 3 and 4 could be viewed as being milestones

	Dependencies		Progress			
			Current Plan			
Task ID	*On other Tasks*	*Of other Tasks*	*Start Date*	*End Date*	*% Complete*	*Comments*
1	-	3				
2	-	3				
3	1,2	5				
4	-	5				
5	3,4	-				

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RAID Log

A RAID Log is a project management tool that helps to pro-actively consider things that might go wrong and how to manage these situations, in addition to recording what happened when issues did arise

R	**RISKS**	The problems that might arise, how likely these are to occur and what would the impact be, how these might be mitigated
A	**ACTIONS**	Record of all actions being taken, with allocated owners and target dates
I	**ISSUES**	The actual issues that have arisen during the project, action being taken to resolve these, and the current status
D	**DECISIONS**	List all decisions that need to be taken during the project

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Risk Assessment

Every project faces potential risks that will impact on the project itself or the outcomes that the projects aims to deliver. Good risk management is at the heart of good project management

As before, I believe that populating the risk section is best done through workshop sessions with the people involved in the project, where you should consider the following questions:

- What are the major **risks** that could prevent your project from delivering as predicted (time, cost and outcomes)?
- What would the **impact** of this risk be on your project?
- What's the **probability** (likelihood) of this risk occurring?
- What pro-active steps could you take to **mitigate** the risk, to reduce either the impact or probability, or both?
- What is the **residual** risk?

You should also assign an OWNER to each risk, who monitors the risk

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Testing & Acceptance

Testing can be tricky, in particular if elements of the project combine to deliver the outcome. Good planning involves considering how you can test at each stage and what level of quality is acceptable

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You can have the best project plans, delivered everything to time, but unless what you deliver is properly tested, you might deliver something that is of poor quality and fails to meet objectives. You need to plan what and how you will test as part of project planning:

- What different project deliverables will need to be tested, both in isolation and combined with others ("integration" or "end-to-end" testing)?
- What "test" facilities will you have access to? If you need to test "live" could this be done without impacting on customers?
- Who will do each testing activity, including preparation of test scenarios and expected results?
- Do you want to involve some "customers" in testing and, if yes, how?
- What level of quality must be met before you are happy to implement (typically involves specifying the level of defects you would accept)?

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Typical Pitfalls

Many projects fail to meet the agreed timescale and cost and/or fail to deliver the hoped for outcome – good planning can help to avoid most of these situations

Things that go wrong during and after projects include:	How good planning helps to avoid these:
▪ Scope changes lead to delays and more cost	▪ Adopt a robust change control process
▪ Dependencies between tasks(including other projects) not well understood	▪ Detail all dependencies within the project schedule and monitor these
▪ Poor acceptance testing leads to poor quality of deliverables and need for remedial action	▪ Plan the testing you will undertake and what level of defects you will accept
▪ Slow decision-making leads to delays	▪ Define an appropriate governance structure
▪ Insufficient consideration of potential risks	▪ Develop a RAID log and assign risk owners

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Questions

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