

PUBLISHER

ize Consulting

PLANNING YOUR PROJECT

LIKE A

PRO

7

Things To Do Before Starting A Project

Brad Egeland

Planning Like a Pro

1.0 Intro

Planning. It's a word that makes project managers, excited project team members, and enthusiastic project customer cringe as they consider moving forward on a hot project. Even executive management within the delivery organization – who above all should understand the concept of planning and what it means to the bottom line of the project – often would rather push a project forward than patiently wait for the methodical planning phases and deliverables to play out.

Why do we need planning? Because rework kills projects. And proper planning kills rework. In the project management world of rock-paper-scissors, planning is the rock to the rework's scissors. With proper planning – SMASH! - no rework.

So project managers: slow the project down, convince yourself that planning is the best thing you can do at the beginning of a good long project, then take an hour or two or three and convince the project sponsor and anyone else pushing to the start your new project with less than adequate planning that it's the right thing to do. It's the profitable (believe it or not) thing to do, and everyone – I repeat EVERYONE – right on down to your anxious, tight-fisted project sponsor and your disbelieving executive management team – will see the benefits of proper and detailed planning as YOUR projects are the ones coming in on time and on budget with satisfied customers and happy end users testifying to your brilliance as a project manager. Ok, this is not guaranteed, but it could happen. And you will look smarter for it...trust me.

What to takeaway from this book...

My hope for the readers of this book is that they will go from wondering how to plan for and prepare to perform things like communication planning, risk management, preparing for and kicking off the engagement with the project customer, and creating a project schedule that is ready to use as a tool to lead a detailed and complex project engagement. I am not going to go through all of the details of each of these with you – that is for another book or another article or possibly even a textbook. What I want to give you is the wisdom and knowledge from someone who has been there and done that...someone who knows how it feels to succeed in each of these areas and also to fail in each of these areas and doesn't want to see that happen to you. This book is for new and old PMs alike...a document that can help give me them confidence in each of these areas because it lays some fundamental groundwork for each concept and activity and puts you in the position to move forward with success.

2.0 Planning Fundamentals

Upfront planning. We get frustrated by needing to build many hours into the project schedule to accommodate the proper amount of planning because we're thinking that these valuable hours could go to doing the real work. But in reality, deep down we know that upfront project planning is one of the most critical elements of the project. If not enough time is spent really laying out the project, understanding requirements, asking the right questions, and planning the work, then your project is likely doomed to fail.

How often have you heard it said that planning is a waste of time? No sooner is the plan completed than something comes up on the project requiring a change to the project plan. Some argue that the plan, once completed, is disregarded and merely put on the shelf so the team can get down to doing some real work. In people management, the planning activity involves deciding on the types of people resources that will be needed to discharge the responsibilities of the department. That means identifying the types of skills needed and the number of people possessing those skills.

First we must understand that a project plan is dynamic. It is expected it to change as the project itself evolves. A complete plan will clearly state the tasks that need to be done, why they are necessary, who will do what, when it will be completed, what resources will be needed, and what criteria must be met in order for the project to be declared complete and successful.

There are three benefits to developing a project plan:

Planning reduces uncertainty. Even though we would never expect the project work to occur exactly as planned, planning the work allows us to consider the likely outcomes and to put the necessary corrective measures in place.

Planning increases understanding. The mere act of planning gives us a better understanding of the goals and objectives of the project. Even if we were to discard the plan, we would still benefit from having done the exercise.

Planning improves efficiency. Once we have defined the project plan and the necessary resources to carry out the plan, we can schedule the work to take advantage of resource availability. We also can schedule work in parallel; that is, we can do tasks concurrently, rather than in series. By doing tasks concurrently, we can shorten the total duration of the project. We can maximize our use of resources and complete the project work in less time than by taking other approaches.

The project manager must know where he is headed, where his team is headed, and where the project is headed. Not knowing the parameters of a project prevents measurement of progress and results in never knowing when the

project is complete. The plan also provides a basis for measuring work planned against work performed.

Summary

I know...many of us would rather jump directly into the process of configuring the solution. The act of significant (proper?) upfront planning requires time and money and can frustrate key stakeholders who are anxious to see early action and results. The PM on the engagement has the responsibility to see to it that the proper amount of upfront planning is performed before allowing work to progress. Without it, rework is likely, the budget and timeframe will continually be tested and success becomes harder to achieve.

Takeaways

- Planning is not a waste of time
- Upfront planning is critical
- Planning reduces uncertainty
- Planning increases understanding
- Planning improves efficiency

3.0 The Project Kickoff

Depending on the organization, of course, the process of getting the project handed off to the project manager can be different from company to company. For example, in a professional services organization, often there is a “sales” process handled by an account manager who is tasked with selling the project, implementation, service, etc. to an external client. Once the sales process is complete on a potential project, it’s handed off to the project manager to run the show. In a perfect project management world the project manager would be part of that sales process, but sadly that is often not the case. So the project manager takes what he is given and that’s what he has to work with. Often, his initial tools are:

- Statement of work
- Project budget
- Estimated hours (part of the budget)
- Assumed list of needed resources and skill sets
- Draft schedule based on some key milestones
- A project management process or methodology

What’s missing?

That’s a good starting list, but there’s some things missing and the project manager is going to need to fill the holes by first making assumptions and then taking those assumptions to the customer to hammer out the details. This is best done in the form of a project kickoff meeting.

The concept of the kickoff meeting is to go over what you have so far for the project, discuss assumptions and issues, figure out the project communication processes and logistics, and get some more detail on what the customer truly wants in a very high-level forum.

With that said, let’s look in further detail at what needs to happen before, during, and right after a project kickoff meeting in order to get the project management process off on the right foot.

Before the kickoff meeting

- **Review the statement of work.** At this point, the statement of work is basically what you have for customer requirements and assumptions. Use it to evaluate against any materials you received from Sales. Analyze the deliverables and milestones in detail. Document any concerns that should be targeted for discussion with the customer.
- **Hold a transition call with Sales.** Hold a call with the account manager who closed the deal. Get all possible materials from them and pick their

brain over one or two calls or sit down meetings. There's likely to be good information gained that isn't in the statement of work. Here's where you find out quirks and special interests of the customer or project sponsor.

- **Review and revise the draft project schedule.** The account manager is not a project manager. Take the schedule you were handed – assuming you were even handed one – and revise it using what knowledge you've gained so far on the project and your overall project management experience. Make it look like a project manager's schedule heading into the kickoff meeting with the customer.
- **Create a detailed presentation for the client.** Put together a nice presentation as the basis for the kickoff meeting. This should contain key points from the statement of work, a discussion of the project management process, and a highlight of assumptions and milestones.

During the kickoff meeting

- **Present.** Present the materials to the customer and take careful notes.
- **Discuss and revise the schedule.** Discuss milestones and make any necessary task revisions to the project schedule on the fly, if possible.
- **Discuss and document issues and concerns.** Go over any concerns or issues you think are relevant and start a real issues and risk list at this point.
- **Identify a communication schedule and process.** Layout how and when the formal meetings and communications will happen and then you can build those into the schedule as well.

Following the kickoff meeting

- **Begin weekly formal meetings.** Starting week one after the kickoff meeting, begin holding formal status calls with the customer and begin delivering formal status reports to them.
- **Revise the schedule and distribute.** Revise the schedule after the meeting and begin a process of revising and delivering the schedule weekly.
- **Complete the delivery team.** Work with management to put names to the resources and skill sets needed so the real work can begin.

Summary

A formal project kickoff meeting is that last chance (or first chance depending on how you look at it) to lay the project out there for all to see and comment on. But more importantly it is that opportunity to tell the customer how you will manage the project and to ensure that expectations are properly set. If things seem amiss, it is the best time to go back to the drawing board and reset the timeframe, budget or SOW...whatever seems to be the issue. Because once the development of the solution has started, it becomes much harder – and far more costly – to do so.

Takeaways

- Review all relevant materials from all sources to prepare for kickoff
- Revise the draft schedule
- Create a formal presentation
- Introduce yourself to the client prior to kickoff
- Run through dates, assumptions, and methodology with the client at kickoff
- Use the kickoff to properly set expectations for the client
- Set the communication process in motion the kickoff meeting

4.0 The Initial Schedule

The initial schedule – as already mentioned as part of the sales transition and kickoff process – has been drafted at this point. In fact, if your organization is like most – some sales person or account manager who has never been a project manager likely “drafted” an initial project schedule for the project as part of the sales process. It’s ok, it’s not their fault. They are doing their best to show the project client – or potential client at that point – that your organization understands the importance of the project, what major tasks go into delivering successfully on the project and – quite often – that your organization understands the roles necessary to deliver on the project and has those resources available to do so.

Go with What You Know

The best organizations and the best project managers strive to use what are called project management best practices in their best effort to achieve frequent successes in their project management deliveries. Nothing is guaranteed, of course, but using best practices in this case of the initial project schedule usually means we use repeatable and reusable templates to come up with a good, workable schedule for the project at hand.

There are project management templates out there to help the project manager get started on this task for nearly every industry imaginable. The key is to just get started ... sometimes those first few tasks defined in the project schedule are the hardest ones to get logged. Your team - and even your customer - can help you fine-tune the project schedule. But I wouldn't ask them to be involved at the very beginning. Get it drafted first, then take it to your team and customer. Too many heads working on it up front will make it take far too long.

There are some steps that I suggest following to get through the completion of the draft schedule. Let's look at each of these steps in some detail...

- **Set up a shell schedule.** Using a project management template for project schedules – or, as mentioned above, using one of your own old project schedules from past successful projects – draft an outline project schedule with assumed or high level tasks for this type of engagement.
- **Review the statement of work.** This is where the project manager will get a jump-start on drafting the project schedule. The statement of work should identify key deliverables, milestones, important dates, planned resources, and assumptions for the project. It likely also contains estimates that were derived during the sales process and that's what the contract with the customer is based upon. This is all key information that needs to go into the schedule. Load this information into the proper place in your current draft schedule. This activity will likely cause you to

reconstruct your draft schedule quite a bit, but it was important in that first step to get at least some sort of schedule started.

- **Set up resources.** Based on the tasks you have in your schedule, start loading resources. You may not have names yet, but you probably know what type of position is needed for a given task and the statement of work and original project estimate will probably help you some with this portion of the effort.
- **Input levels of effort.** Based on your own knowledge – this is where having a technical background helps if you're working on an IT project – and based on information from the statement of work and/or original estimate, begin inputting hours into your project tasks.
- **Create task dependencies.** Once you have tasks defined and assigned to a resource and you have hours entered for as many tasks as you can obtain or come up with estimates for (guess for now on the rest), start creating interdependencies for the tasks. This may be guesswork at this point, but do your best. It's obvious that the review of a project deliverable has to start when the work on the deliverable is actually done. But other dependencies are not as obvious. For now, at least get the obvious ones documented.
- **Take it to your team and customer.** Now is the time to take the draft schedule to your team and get their input and feedback. Once you've incorporated the information your team provides, then you're ready to put it in front of your customer. Whether this is before your first status meeting or not, is up to you and your customer, but it's likely that your customer will provide meaningful feedback as well. Creation of this project schedule is a critical task in the project management methodology. Getting input from all the players is very important.

Summary

The project manager is likely to get handed someone's perception of the draft schedule for the engagement they are about to take on. This is the PM's opportunity to make it their own before the formal kickoff session and show the customer – and the world – that they understand the work involved and will manage it in detail. It is their time to take charge and to get buy-in from the team...thus helping to ensure team member ownership of tasks and accountability.

Takeaways

- Start your schedule with the draft from Sales
- Build out the detailed tasks according to the SOW

- Input estimated efforts and dependencies
- Review the schedule with your team to get their buy-in
- Review the schedule with the customer and ensure their understanding of the tasks involved in completing the effort

5.0 Requirements Definition

There can be no project without a customer. And there can be no project without requirements. The customer can be internal, external, your boss, yourself. But there is always a customer...someone the project is being run for – someone is ultimately the end user of the solution that the project implements.

Customers Often Lack Proper Requirements

And with the customer comes requirements. If there were no requirements, there simply could be no project. The problem with requirements is that, as we all know, they are ever changing. Trying to keep a customer from changing their requirements during an engagement is like trying to my 15 yr old daughter not to send text messages. And trying to get the customer to document good, solid, detailed requirements prior to the engagement starting is like...well...impossible.

The customer 'expects' you to help them extract the necessary requirements. It's happened to all of us, right. The customer is paying the price for the project so they naturally think they can go into the engagement with just some high-level requirements drawn up by a few SMEs and the rest will just get extracted during Exploration.

What Good Requirements Can Do for a Project

That's fine – and that is often how it goes. However, what the customer seems to always be unaware of is that by going into an engagement with well-documented, detailed requirements they can usually accomplish the following:

- Significantly reduce or eliminate the need for change orders, thus reducing the overall cost of the project
- Reduced change orders means reduced timeframe for the project meaning it is more likely to be delivered on time without extending the schedule to accommodate changes
- Test cases can be written earlier in the process due to requirements that are not moving around – meaning better test cases and better prep for UAT
- Better end product – if requirements are well understood early on and are not a moving target, it is easier for the delivery team to deploy the solution that the customer really wants which also means less post-deployment work and likely less cost to the customer

These are just a few of the benefits...I know there are more. The bottom-line is that the requirements drive the project. Poor or non-existent requirements mean

an extended project, budget overruns, and missed milestones. Solid requirements mean a much greater chance for on time and on budget delivery of a solution the customer wants and needs and ultimately greater customer satisfaction. Of course there are no guarantees...and an Agile approach that allows for requirements to shift and for the project to react can help mitigate the overall impact to the project.

Summary

Many things help drive project success, but requirements are critical. If you head into a project with few or poor requirements, it may be worth the pain and suffering to suggest that the customer go away and draw up more detailed requirements before engaging your team. I've done it before – though usually I get the most success and agreement on that approach with internal customers. External customers rarely are willing to put anything on hold. For those customers, you must get out the change order pad and start documenting and estimating. They need to know up front – as soon in the engagement as possible – what it's going to cost them to have your team extract the detailed requirements for them if that wasn't priced/estimated as part of the project.

Takeaways

- Customers rarely have good requirements ready
- Good requirements are important for reducing change orders, improving the testing process, and producing a better, usable end product or solution

6.0 Planning for Risk

Risk management may be one of those necessary evils in the project management world. Like buying life insurance when everyone in your family has lived to be 100 years old. But to go without any risk planning is never a good idea...and you'll be very thankful you performed this critical planning process if and when any of the potential risks you identified and planned for become a reality. Let's consider what a good risk management plan is and should include for your project engagement so you can start on the right path to success and risk planning.

The purpose of the plan

The risk management plan lays down the groundwork for how risk management will be carried out in a project. It serves as guidance for the risk process, its thresholds, and its formats, defining the roles and responsibilities of stakeholders in risk management. It is notable that the risk management plan is not a listing of specific risks and is not used to establish the particular strategies for risks, once they are identified.

Who should see it

The risk management plan is shared with project stakeholders to clarify their roles and responsibilities in the risk management process and to identify when specific potential risks are truly of concern to the organization. It also outlines the risk budgeting process, detailing how and when risk contingency funds may be allocated and applied.

The contents of the plan

The risk management plan consists of basic information about how risk management will be conducted during the project. It does not address specific behaviors associated with specific risks, but instead forms a framework for the rest of the risk management process.

Risk Process. Risk process may be as simple as two steps (e.g., assessment and response) or as complex as six or seven steps (e.g., planning, identification, qualification, quantification, response development, and response control). The process steps should include clarification on how each of the processes will be carried out and the level of depth of information to be provided for each.

Risk Responsibilities. Just as the buyer and seller in project environments have different responsibilities for deliverables, so do they have different responsibilities for risks. Those responsibilities should be outlined here. Responsibilities may include information on who will identify risks, as well as who should evaluate them and develop strategies for those that are of the greatest significance.

Risk Thresholds. Thresholds represent personal and organizational tolerance for risk. They are the definitions of tolerance in terms of budget, schedule, requirements, and other sensitive cultural issues (e.g., politics, media exposure). They are normally expressed as ceilings beyond which the project should not proceed, or as notification points for upper echelons of management.

Risk Finances. This element of the risk management plan may address both funds set aside for risks within the project (contingency reserve) and funds set aside within management control for risks outside the project's immediate concern (management reserve). In both cases, this component of the plan details how and when the project team may draw down funds from those reserve accounts. Risk finances may also provide detail on how the amounts for the reserve accounts will be established.

Risk Evaluation. Because evaluation protocols vary from project to project, the risk management plan should include some detail on how risks will be scored and termed. Particularly for risk qualification, there should be some definition of terms for both the probability of a risk's occurrence and for the impact should it come to pass. Many projects employ the high–medium—low (H-M-L) scheme for both impact and probability. The risk management plan should define each of those terms.

Process Timing. High-risk projects may require frequent risk reevaluation. Projects with lower risk may not require such frequency. The risk management plan should include detail on the frequency of risk identification, assessment, and response development, as well as the appropriate application of any tracking processes or documentation.

Summary. How we choose to plan for, manage and deal with risks is up to the project manager, team, customer and policies of the organization. It's a bad idea to completely ignore risk planning though...if we do that we'll be constantly reacting to 'surprises' on the project that can become very costly and ruin the project timeline. With proper planning, these 'surprises' could have been mineralized or even eliminated (complete avoided).

Takeaways

- Risk planning and management is critical to project success
- A risk plan helps identify the risk process, assign responsibilities, determine how risk will be manage, and sets risk thresholds

7.0 Planning for Project Communication

Some project documentation falls in that grey area of importance. Is it necessary or is it busy work? Your project management methodology may call for its creation, but is it really providing any real benefit to the project? In some cases and for certain smaller projects, the answer may be no. But in the case of the communication plan, I'm a firm believer that answer is yes.

Not all projects require a communication plan – certainly it may not be necessary on a very short term or small dollar engagement. Project management templates are available to produce documents such as this, but spending valuable project budget dollars creating a communication plan for a three-month project is not the best use of project funds. But documenting how and when communication will happen on an eighteen month, five million-dollar project makes a great deal of sense. It can provide the project manager, the delivery team, and the customer with a high level of comfort knowing that the formal communication that will happen on the project has been fully planned and agreed upon by both sides.

If your project is large enough and you can clearly see the value in – or your customer can clearly see the value and wants to pay for – producing a formal communication plan during project planning, then by all means proceed with its creation. There are some key pieces of information that the communication plan should include. These are:

- **Document introduction.** This is just a formal introduction to the document. What is contained here is information about what the document will cover and what its overall purpose is.
- **How project information will be gathered.** This section of the communication plan will discuss how information will be gathered through both formal and informal project communication. Formal communication includes project status reports, project status meetings and notes, issues and risks lists that are documented and reviewed, and revised project schedules that are updated weekly and distributed to the team and the customer. Informal communication happens in the form of adhoc calls and emails, etc.
- **How information on the project will be disseminated.** This section describes how and when the information will be provided to members of both project teams. This will contain a formal schedule for each type of communication. This is the schedule that would have been jointly decided upon by the delivery project manager and the customer or project sponsor during the formal project kickoff process. Here is where you indicate when project status meetings will happen, when project status reports will be distributed, when issues and risks will be reviewed, and when the project schedule will be regularly reviewed. This section will also identify the party that will lead each type of formal communication.

- **The formal project communication matrix.** The communication matrix will list all key communication points on the project (i.e., key project resources) and it will include the contact information.
- **Signoff for the plan.** This section serves as a formal customer review and acceptance signoff for the communication plan document. By signing, the customer agrees that they understand the document and approve of the communication processes outlined in it for the project.

Summary

A communication plan doesn't have to be that long. It can be just a couple of pages giving key contact info for all participants and indicating how and when regular status meetings and formal calls will happen. For long or more complex projects, more detail may be needed. The important thing is to do it – put this plan together and it will serve as a nice go-to document for all involved for the rest of the engagement...and the customer will be comfortable having this at their fingertips.

Takeaways

- A formal communication plan helps define how, when, where, and by whom regular communication will be initiated and happen on an ongoing basis
- The communication plan gives the key stakeholders a go-to document to reach out to individuals on the project for information and decision making
- The communication plan should include a straightforward communication table or matrix
- The communication plan should have formal customer signoff to ensure proper understanding and accountability

8.0 How Much Planning is Enough?

Let's sum up what we've learned. Planning is good...planning is necessary...planning is essential to project success...and planning does cost money, but it usually saves money, too. I'm a fan of planning. I really am. I'm a fan of project success, too. And I strongly believe that those two concepts – planning and success – go hand in hand. Without proper planning, processes, methodology...and best practices in general...in place, then I strongly feel that you are leaving your project successes to chance. Or luck. You will continually be frustrated by frequent project failures and setbacks and you will constantly be struggling to understand how your successes happened and you will be finding yourself unable to repeat those successes.

I know this from experience. I was part of a newly created project management office (PMO) in a Fortune 500 aviation and engineering firm that had relatively no structured methodology in place ... and certainly no experienced PM leadership ... and we failed miserably. In fact the PMO actually failed twice, believe it or not.

One size does not really fit all

But how much planning is enough? How much is too much? Can you overdo the planning process? Some may disagree, but I believe that there is a point on certain projects where the law of diminishing returns kicks in. I am a strong believer that the amount of planning and structure is often going to be in direct correlation to the size and complexity of the project. One size does not fit all.

I've led some very high dollar, complex projects where we started out with mind mapping software to ensure we were capturing everything we could about the business processes, capturing everything that all stakeholders could possibly see as areas of the business that are affected by current processes and areas that would be affected by the new solution. We used the mind mapping software as a way of capturing the before and after scenarios and what was needed from the end solution.

I've also led some very straightforward projects that I was able to move from kickoff to development with very little planning because the high level requirements we had from the outset were quickly turned into adequately detailed requirements and then into a requirements document and signed off without much fanfare. Why? Because the final solution was not too complex and because it was a path we had been down before in terms of work and technology. No other real planning documents were needed for my delivery team to get started on the solution and enough had been covered at kickoff time with the project sponsor to properly set expectations on meetings, communication, methodology, schedule and the change control process.

Summary

How much planning that goes into each effort may depend on the methodology and practices in place in your organization. Your leadership and even your industry may mandate the same rigid planning and documentation be completed for every project no matter the size and complexity. But, in general, I feel that much time and cost can be saved on projects where it becomes obvious that extreme planning is unnecessary. Complex projects need detailed planning in order to succeed. Less critical projects, less complex projects and engagements involving end solutions that you've delivered before can certainly take advantage of current knowledge gained from previous project experiences and deliver success with less cost and in a shorter time frame by requiring less effort in the planning phase.

Takeaways

- Planning must happen in order for a project to be successful
- How much planning is required depends on several factors including project budget, project duration, and customer preference
- The good project manager should not let the engagement start without proper upfront planning

Conclusion

This document is not a “how to” for planning out a project or kicking off a new engagement. What it does do is lays the groundwork for many of the things we should be doing from the beginning of the project but have a tendency to overlook or give just a cursory effort to. Be sure to include the concepts in this document as part of your upfront planning and preparation process and – while you won’t be guaranteed success – you will be guaranteed to be better prepared to successfully deliver on your client’s project. And that is a good thing.

About the author:



Brad Egeland is a Business Solution Designer and an Information Technology / Project Management consultant and author with over 25 years of software development, management, and project management experience. He has successfully led project initiatives in Manufacturing, Government Contracting, Creative Design, Gaming and Hospitality, Retail Operations, Aviation and Airline, Pharmaceutical, Start-ups, Healthcare, Higher Education, Non-profit, High-Tech, Engineering and general IT.

In addition to his accomplishments in IT development, resource, and project management, he has also authored more than 2,000 expert advice and strategy articles on project management, small business, and information technology for his own website as well as sites and printed material for software and service clients all over the world. Brad is highly regarded as one of the most prolific go-to authors on project management general topics, advice and strategy in the world. He often bases his articles on his own personal experiences, successes and frustrations, providing insights on how to combat issues and deficiencies encountered along the way to the average project manager, business owner or strategist looking for help in a given situation.

Brad is married, a father of 10, and living in sunny Las Vegas, NV. You can learn more about Brad or contact him through the following:

Website: <http://www.bradegeland.com/>
Facebook: <http://www.facebook.com/bradegelandconsulting>
Twitter: <http://twitter.com/begeland>
LinkedIn: <http://www.linkedin.com/in/bradegeland>
Email: brad@bradegeland.com