

Project planning

A project planning workshop is designed to assign resources, sequence the work, create a schedule and identify and create risk actions to protect the project plan.

The outcome is a list of assigned resources with agreed resource requirements, a project critical path and risk mitigation actions (threats and opportunities) to protect or enhance the plan.

Benefits

We have all worked on a project where people are not sure what they have to do, what quality is required, how much time has been allowed and when the work is due. Often, work starts as people don't want to delay the project by waiting for further guidance.

This can lead to someone working on the wrong work package which burns valuable time and causes delays to the schedule.

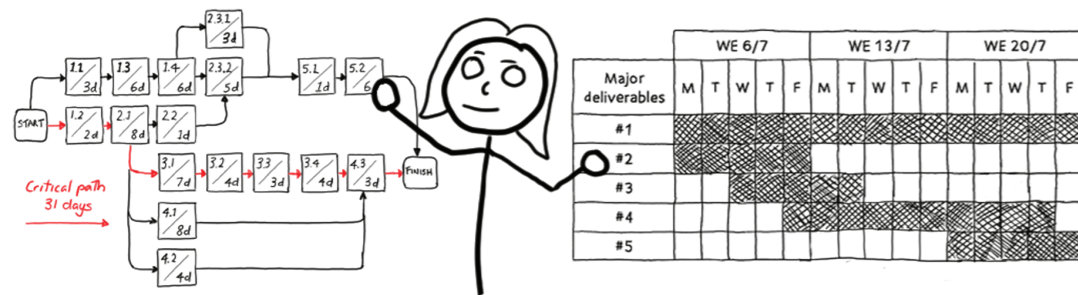
This situation can be very frustrating for our sponsor and project resources.

This can be avoided by assigning people to individual work packages. It sets clear expectations about who will do the work. It also highlights the expected time commitments, enabling negotiation with resource managers and resources so they can make themselves available to do the work. Importantly, assigning a person also increases the likelihood of our work being successfully completed – someone is now accountable.

By sequencing the work our resources can see the order in which the work should be completed. The visual network diagram highlights gaps, conflicts, and critical work packages. Applying a calendar to the sequence of work allows us to build a schedule.

Our resources now know when to start work and when it's due to be completed. Now, it is timely to identify any resource conflicts and work with the resources to develop a strategy to solve conflict. For example, the due date could be moved or another resource found.

Our completed plan provides an opportunity to identify in advance any risks that threaten or enhance the plan. We can identify risks by simply asking where have we failed before, where is the work complex and what's on the critical path? These risks can be understood and actions created to prevent them occurring. This risk analysis process will significantly improve the likelihood of our project being successful.



Involve individuals responsible for doing the work as it builds commitment and ensures the plan is reasonable and practical.

Activities

Pre-work

1. Work with the project sponsor to design and plan the workshop using the planning tools.
2. Create a workshop communications deck and ask the sponsor to send it to the participants; this raises the importance of the activity.
3. Review the project background documentation including the initiation work to create a high level project overview (what, why and who is involved?).
4. Create workshop posters, project planning template and arrange a scribe to be ready for the workshop.

Steps

1. Bring everyone onto the same page using the SPACER tool.
2. Provide a common understanding of the detailed context, objectives, WBS and resource requirements.
3. Assign resources to each work packages using the resource assignment tool.
4. Sequence the work packages in a network diagram and create a critical path using the sequencing tool.
5. Create a schedule by applying the calendar to the network diagram using the scheduling tool.
6. Schedule resources to meet the project plan using the resource scheduling tool.
7. Identify risks and mitigation actions to address the threats and opportunities using the risk assessment tool.

8. Document the next steps to be completed outside the workshop including a project kick off meeting using the starting the project tool including communicating the outcomes.
9. Wrap up the workshop and feedback using the capture plus/deltas tool.

Post session

1. Nominated scribe to populate the project planning template during the workshop.
2. Facilitator to finalise the project planning template.
3. The sponsor is to validate the planning information and issue to the project team.
4. Conduct a kick off meeting or workshop once planning is approved using the starting the project tool.

Tips

- The schedule complexity will grow with the number of work packages. Aim to keep the schedule high level so as not to confuse people and become a slave to monitoring and updating the schedule.
- Securing resources for a project can be very stressful. Once a project starts, people want to see results and the spotlight will be on us. Don't underestimate how critical confirming resources are to our project. Without resources there is no progress.
- The best source of information about potential risks is people with experience in our project. Involve them in the risk assessment process.

Duration

- The length of the workshop will depend on the size of the project and quality of the pre-work. If the initiation process has been solid and done well then the planning work will be easy.
- This planning could be done in a 4 – 6 hour session. If the initiation is poor we will need to backtrack to agree on the benefits, objectives and scope and require more time.

Tools

- Mandatory facilitation tools
- Detailed context
- Project objectives
- Resource assignment
- Sequencing
- Scheduling
- Resource scheduling
- Risk assessment
- Starting the project
- Communication plan