Joint Project Planning Session

Hows and Whys
Joint Project Planning Session Notes

Scope The Project
• State the Problem/Opportunity
• Establish the Project Goal
• Define the Project Objectives
• Identify the Success Criteria
• List Assumptions, Risks, Obstacles

Develop Detailed Plan
• Identify Project Activities
• Estimate Activity Duration
• Determine Resource Requirements
• Construct/Analyze the Project Network
• Prepare the Project Proposal

Launch The Plan
• Recruit and Organize Project Team
• Establish Team Operating Rules
• Level Project Resources
• Schedule Work Packages
• Document Work Packages

Monitor/Control Progress
• Establish Progress Reporting System
• Install Change Control Tools/Process
• Define Problem Escalation Process
• Monitor Project Progress vs. Plan
• Revise Project Plan

Close Out The Project
• Obtain Client Acceptance
• Install Project Deliverables
• Complete Project Documentation
• Complete Postimplementation Audit
• Issue Final Project Report
Joint Project Planning Session Agenda

- Team Building Exercise.
- Write the Conditions of Satisfaction.
- Write the Project Overview Statement.
- Create a first-level WBS (entire planning team).
- Create a complete WBS (subteam exercise).
- Present and critique the WBS.
- Estimate activity duration and resource requirements.
- Construct project network.
- Determine critical path.
- Revise and approve project completion date.
- Schedule resources.
- Gain consensus on the project plan.
Project Overview Statement

• Composed of Five parts
  – Statement of Problem/Opportunity
  – Statement of Project Goal
  – Statement of Project Objectives
    • Specific - Be specific in targeting an objective
    • Measurable - Establish measurable indicators(s) of progress.
    • Assignable - Make objective assignable to one person for completion
    • Realistic - State what can be realistically done with available resources
    • Time-related - State when the objective can be achieved, duration
  – Statement of Success Criteria
  – Statement of Assumptions, Risks, Obstacles
    • Issue - what is the issue which creates the assumption, risk, obstacle
    • Impact - what is the impact of the issue
    • Action - what can be done to reduce or eliminate the impact
JPP - Identifying Project Activities

- The planning team agrees on the approach to building the first level of the WBS.
- The planning team creates the Level 1 activities
- Divide the planning team into groups, one for each Level 1 activity
- Each group agrees on the approach to building the remaining WBS
- Each group reports their WBS to the team.
- The planning team critiques and discusses the group presentations and completes the WBS.
Approaches to Building the WBS

• Noun Type Approaches
  – Physical Decomposition by specifying physical products or subassemblies
  – Functional Decomposition by specifying function components

• Verb Type Approaches
  – Design-Build-Test-Implement
  – Objectives/Milestone
WBS Activity Decomposition Test

- Status/completion are measurable
- Clearly defined start/end events.
- Clearly defined dependencies to activity
- Activity has a deliverable.
- Time/cost easily estimated.
- Activity duration within acceptable limits.
- Work assignments are independent
  - high cohesion of activity work items
  - low coupling between activities
JPP - Cohesion of Each Activity

Lowest

- Coincidental association of activity work.
  - little or no constructive relationship between work items of activity
- Logical association of activity work.
  - work items of activity are of the same general class of activity
- Temporal association of activity work.
  - work items of activity need to be done at the same general time
- Procedural association of activity work.
  - work items of activity are procedurally related
- Communicational association of activity work.
  - work items of activity share a common interface with other activities
- Sequential association of activity work
  - work items of activity are performed sequentially in a chain of work

Highest

- Functional association of activity work.
  - work items of activity are necessary and sufficient for the activity only
JPP - Cohesion of Each Activity

- If the only reasonable way of describing the work items in the activity is a compound sentence, or a sentence containing a comma, or a sentence containing more than one verb, then the activity is probably less than functional. It may be sequential, communicational, or logical in terms of cohesion.

- If the descriptive sentence contains such time-oriented words as “first”, “next”, “after”, “then”, “start”, “step”, “when”, “until”, or “for all”, then the activity probably has temporal or procedural cohesion; sometimes but less often, such words are indicative of sequential cohesion.

- If the predicate of the descriptive sentence does not contain a single specific objective following the verb, the activity is probably logically cohesive. Thus, a functional activity might be described by “Design a GLOP”. A logically bound activity might be described by “Design all GLOPS” or “Do things with GLOPS”.

- Words such as “initialize”, “clean-up”, and “housekeeping” in the descriptive sentence imply temporal cohesion.
JPP - Coupling between Activities

• Type of connection between activities.
  – interdepartmental connections versus intradepartmental connections
  – standard processes and procedures or one shot flows
• Complexity of the information flow between activities.
  – simple status information or complex documents
• Type of information flow between activities.
  – whether just data information or control information with feedback
• Lead time to create the connection between the activities
  – connections already in place and how much time it takes if not
  – standard processes and procedures or must they be created
JPP - Identifying Duration and Resources

- Use Subject Matter Experts to get a rough idea of duration and resources.
- Spend more effort on front-end activities as things will change as the project progresses.
- Assume typically skilled and loaded resources.
- Use resource profiles rather than specific people.
- Activity sequencing comes later so don’t worry about what comes when.
- Consensus is all that's required.
JPP - Building the Project Network

- Types of Activity Dependencies
  - Finish to Start (when task A finishes, task B may start)
  - Start to Start (when task A starts, task B may start)
  - Start to Finish (when task A starts, task B may finish)
  - Finish to Finish (when task A finishes, task B may finish)

- Sequencing is based on Activity constraints
  - technical constraints
    - irreversible resource or risk reducing constraints or dependencies
  - management constraints
    - reversible management imposed constraints or dependencies
  - interproject dependencies
    - dependencies on deliverables from another project
  - date constraints
    - forcing an activity to occur on a particular schedule