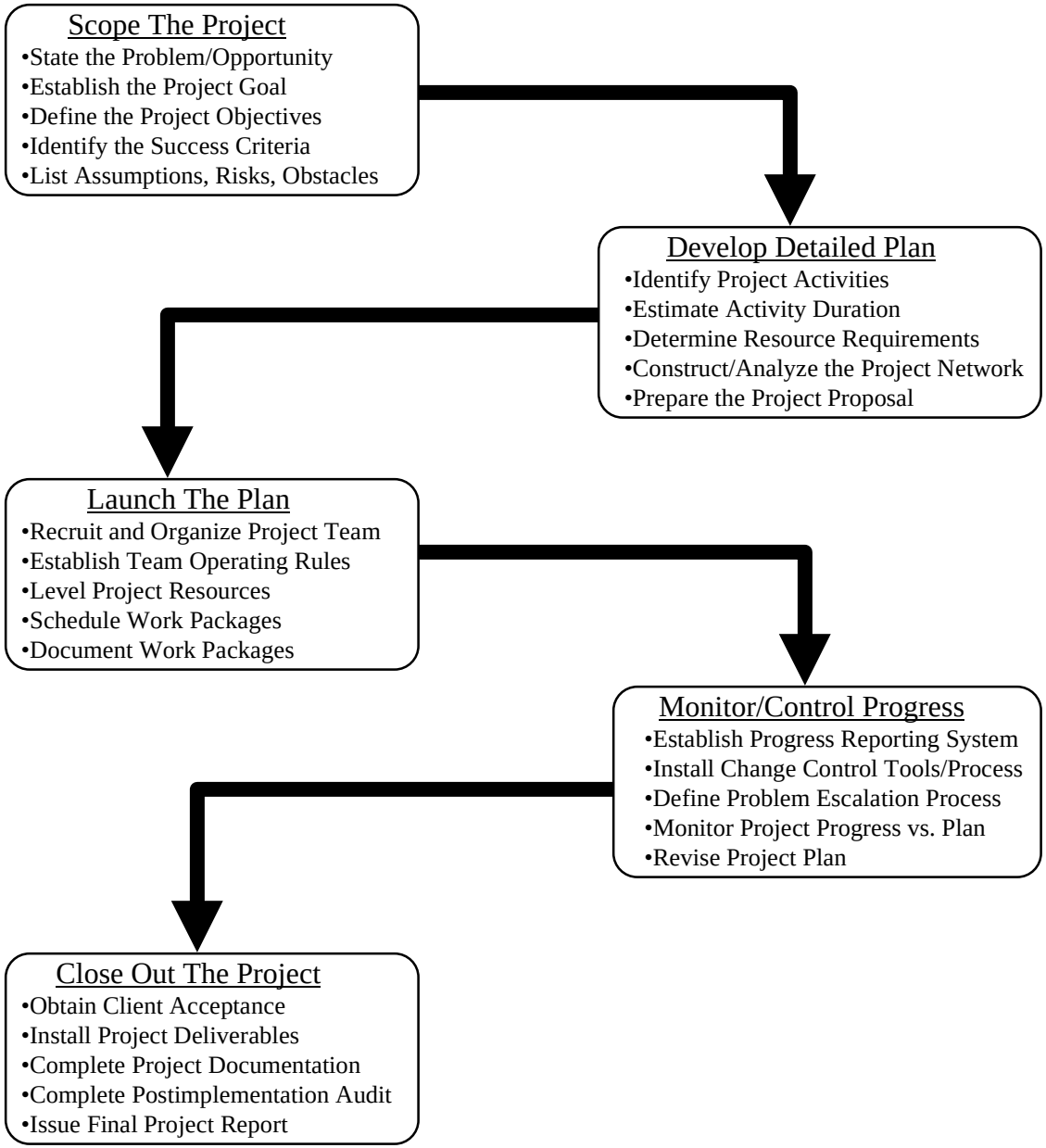
Joint Project Planning Session

Hows and Whys


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