Project Planning Steps from the start

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Executive Summary

So your project is now a project. You have a budget and an expectation to deliver something against a timeline. Well done, you are the Project Manager! To assist you on your journey, certain ground rules and project planning should be agreed upon. This is where you build your roadmap of understanding between stakeholders, the executive and their accountabilities.

Herein are presented logical steps whereby you, the Project Manager, may use to define your project by making transparent its' scope, stakeholders, effort, products, finances, dependencies, method and risk.

The best way to achieve maximum results is to lock all the keys players in a room and work through these steps in a facilitated workshop session. Use whiteboards, key cards, activities and collaboration to hold interest and motivations high and keep them goal focused. Each module should be quick and to the point to avoid apathy with positive outcomes documented later that can form the foundation of your formal project management plan.

This is the beginning of your road as a team and all will be working together closely in the near future.

This is your chance to start building rapport with your team and also for the team to begin knowing their project peers

Let's begin...!

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2. Products

Define the products your project is to create

HINT: This is best done by using a Project Breakdown Structure (PBS), worked down from your Outcomes Statement

3. Phases

Using your PBS, divide work into packages of time

Project Planning
.The First Steps...

Add a constant timeline to the Yaxis and split into phases of Concept, Build, Test and Run

4. Dependencies

HINT:
These would
comes from the
surrounding
environment,
senior staff and
other business
ventures

Define your extra and intra task dependants

1. Scope

Define your project goal statement

Restate your project budget

Confirm the timeframe for your venture

7. Metrics

Define reporting and performance requirements

HINT:
These would
include regular
status reports,
project meetings,
performance
targets and
quality control

6. Issue & Risk

Brainstorm headline issues and risks

HINT: Look to your PBS and ask what will prevent you delivering? Define issues and risks separately. Add treatments and accountability

5. Stakeholders

Define who are the players connected to your project

HINT: Use a structured matrix (RACI) to define who they, what they touch and when

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Final Thoughts

These steps have been designed to provide minimum project information to enable a collaborative, smooth and transparent project working environment. It can typically be completed in two hours however will vary with the magnitude of the project.

Once you have completed one cycle of this process, you should have the following pieces of butchers paper or whiteboard prints:

- 1. Project identification and measurement criteria (Step 1 and 7)
- 2. A Product Breakdown Structure showing project deliverables and roughly divided into a phased project timeline (Steps 2 and 3)
- 3. A matrix defining your project dependencies (Step 4)
- **4.** A matrix defining your project stakeholders and their high-level responsibility and accountability (Step 5)
- **5.** A matrix defining headline issues and risks including treatment action and assigned responsibility (Step 6).

This information should later be distilled off-line, entering into your project control system and distributed to your team.

Remember, this should be an energetic and scalable process that flows and keeps enthusiasms high. Hence this should be viewed as a high-level discovery process only. Further loops may be run at regular intervals or form part of your regular status meetings to increase the level of detail. Particular focus should be on issue, risk and stakeholder management.

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Glenn McTaggart has been involved in delivering change via programs of work for over ten years. He provides professional services that explore new and proven approaches in linking organisational change and transformation with the value of effective program and project management concepts. For further information on the content of this paper and discussion on how Glenn can assist your project organisation please contact the author today.

Kind regards, Glenn McTaggart

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