Project Planning
Day 2

An Old Adage:
Fail to Plan . . .
and You Plan to Fail!

Project Planning – 5 Stages
• Prepare project overview
• Develop work breakdown structure
• Assign responsibilities
• Put plan into action; track progress
• Prepare closeout report
Stage One:
Project Overview

- High-level summary of the project
- It sets the overall scope
- Clearly written to communicate
- Team leader responsibility

What’s In a Project Overview?

- Statement of Problem or Opportunity
- Goals and Objectives
- Measures of Success
- Approach, Process, and Timing
- Assumptions and Risks

Let’s Use the Following Example

You have taken a new job, and it is a significant distance from home. You are concerned your current car will not be reliable given its age.

Look in your course materials, and pull out Appendix pages A-26, 27, and 28.
Questions -
• What is our problem, or opportunity, or situation to be changed?
• Then, what is our goal?

Project Overview

Goals and Objectives
• Goals and objectives describe what we want to achieve to solve the problem or take advantage of the opportunity
  – Keep them simple
  – Focus on the important items
  – Together, they define the scope
  – They must be measurable for success
  – Clearly written

Goals and Objectives - Use the SMART Test
S – Specific
  M – Measurable
    A – Attainable
    R – Relevant
    T – Time-Based
Question -
• Based on our project goals, What are our most important objectives?

Measures of Success
• Targets or results that can be quantified
  – Numbers, frequency, degrees of change
• Avoid intangible measures (e.g., improve attitude)
• Qualify your statements
  – Avoid use of “all” or “never”

Question -
• What should we choose as our measures of success using our project example?
Approach, Process, & Timing

• How will we achieve our goals and objectives?
• What has been effective in similar projects?
• For a new project:
  – Be creative; “think outside the box”
  – Invent new methods when appropriate

Video Presentation

Video Review

• What approaches did the team consider?
• What assumptions were challenged?
• What was necessary for the novel approach to be considered?
Question -

• What should be our approach, process, and timing for our project?

Assumptions or Risks

• Assumptions
  – Things we believe will happen
  – Actions or events that must occur for success

• Risks
  – Undermine success
  – Actions can be planned to offset risks

Assumptions or Risks

Might Include:
• Resources needed
• Timing of resources
• Events outside our control
• Potential delays
• Effect of delays
**Patrol Activity** –
- Select a Scouting related problem or opportunity
- Outline your Project Overview
- Be prepared to share your solution

*Take 5 minutes to complete*

**Patrol Activity** –
- Who would like to share?

**Project Overview . . .**

A Quick Review
- Defined problem or opportunity
- Listed goals and objectives
- Decided on measures of success
- Described approach/process and timing
- Listed risks or assumptions
A Project Overview . . .

- Helps ensure success
- Helps get everyone on “one page”
- Helps prevent
  - Getting off track
  - Scope creep

Stage Two: Work Breakdown Structure

Work Breakdown Structure (Activity Plan)

- Define the activities and tasks needed to achieve our goals
- Prioritize the activities and tasks
- Identify dependencies between activities
- Assign team members to activities
- Define start and stop dates
Project Activities and Tasks

Should . . .

- Pass the “SMART” test
- Have clear start and stop events
- Include estimated time and costs
- Be assignable and manageable
Video Presentation

This clip will help illustrate the second phase of project planning – work breakdown.

• We must challenge assumptions
• We must think outside the box

“If you keep on doing what you've always done you will keep on getting what you've always got.”

Stage Three: Activity Assignments
Team Members Should . . .

- Know project’s purpose
- Understand their assignments
- Know the availability of resources
- Know deadlines
- Match skills and resources
- Establish progress milestones and reporting procedures

Stage Four:
Putting the Plan Into Action

Work the Plan

The Leader Should:

- Provide leadership to the team
- Get the project going
- Assist with decisions & problems
- Obtain additional resources
- Monitor progress for activities
- Monitor team performance
Stage Five: Project Closeout

Closing Out the Project
- Recognize team members
- Prepare After-action report
  - Goals and objectives met?
  - Completed on schedule?
  - Lessons learned
  - Ideas/recommendations

Summary

Five Stages of Project Planning
1. Develop a Project Overview
2. Plan the Work
3. Make Activity Assignments
4. Put the Plan into Action
5. Prepare Project Closeout
A Different Old Adage:

*Plan the Work . . .
Work the Plan!*