




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

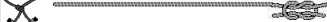




Goals and Objectives
- Use the SMART Test


- 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

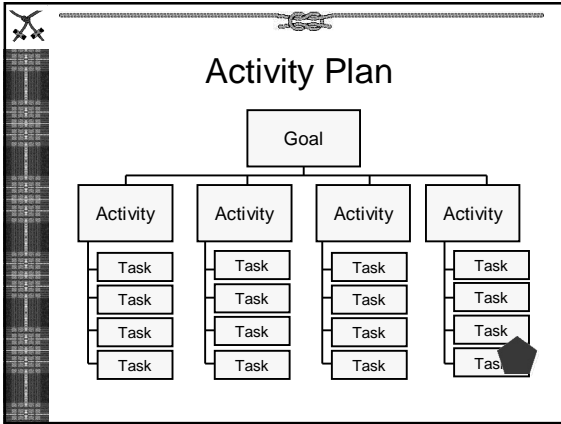


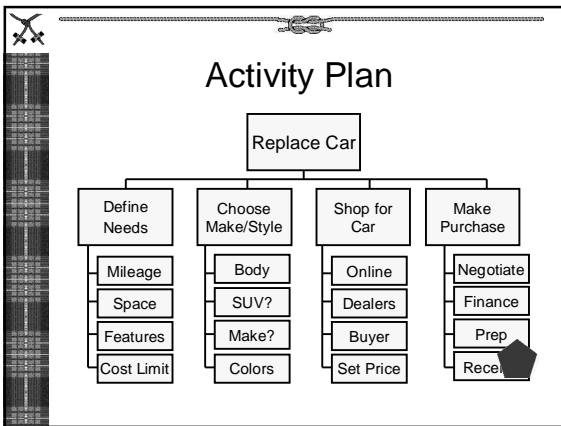


Work Breakdown Structure
(Activity Plan)

- 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




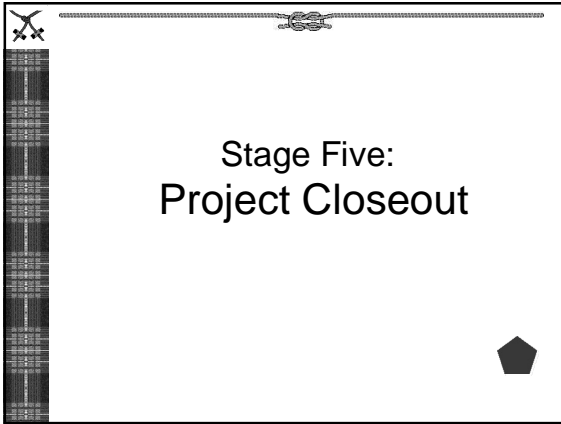


Work the Plan


The Leader Should:

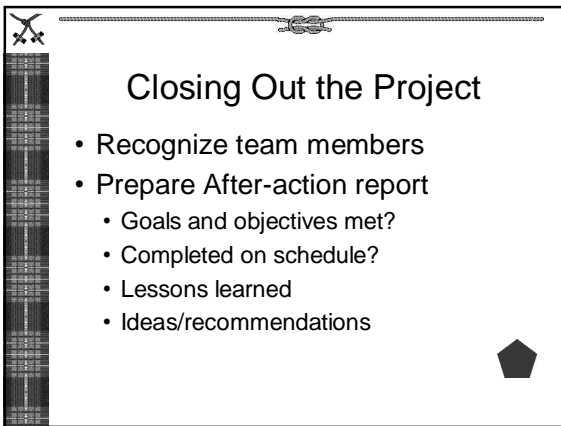
- Provide leadership to the team
- Get the project going
- Assist with decisions & problems
- Obtain additional resources
- Monitor progress for activities
- Monitor team performance






Stage Five: Project Closeout

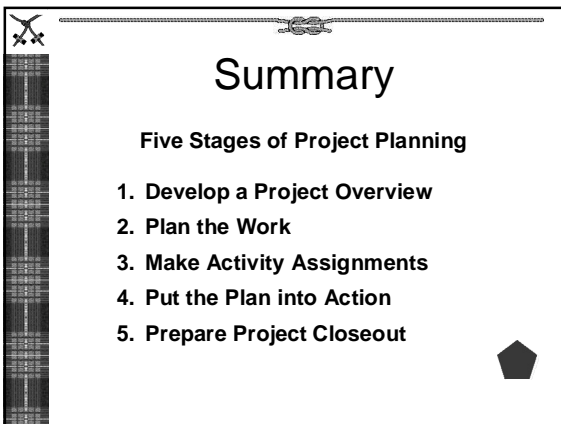




Closing Out the Project

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




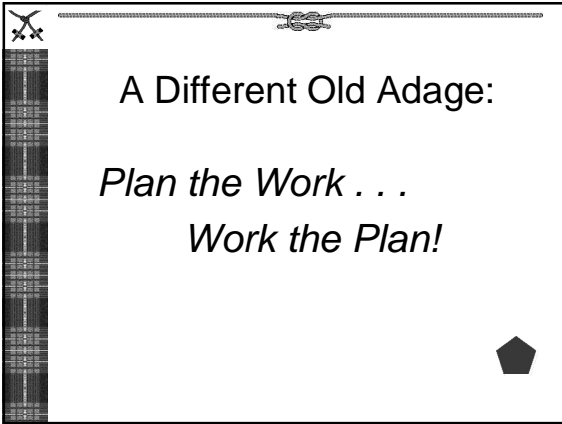


Summary

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!

