Project Success Method

Chart your course to the top

Setting out on a mountain climb without careful planning would certainly be foolish and dangerous. Selecting a route, determining what equipment and supplies to take, and assigning specific responsibilities to team members are some of the decisions that must be made to ensure a successful, safe, and enjoyable climb.

When it comes to projects, people give lip service to planning, but many don't want to take the time and exert the effort to develop a plan. Part of the problem is that they don't have a process for project planning. They don't want to waste time generating a plan that nobody believes is realistic.

This section describes a proven process for developing project plans. The process is logical and efficient, and it produces a comprehensive, integrated project plan. Several popular project management software tools support the process. When the members of a project team participate directly in the process, the team develops commitment to and confidence in the plan. After all, it is their plan for their project.

The project planning process involves the following sequence of steps:

1. Based on the scope definition contained in the charter, break the project down into manageable activities. An activity is anything that will take time in the project schedule. Activities may involve doing something or waiting for something, such as an approval. The activities become the building blocks of the project plan.

2. Assign a member of the project team (or better yet, have them volunteer) to manage each of the activities. The manager of each activity will be responsible for making sure that the activity is performed according to plan. The activity manager may or may not actually perform the activity.

3. Analyze the sequencing requirements among the activities, and develop a diagram, called a "project network," that displays the precedence relationships. The development of the project network involves having the entire team think through the performance of the project. This structured mental simulation is an extremely valuable process and often leads to the discovery of activities that had been previously overlooked. The project network provides the framework for analysis that supports the remainder of the planning process, as well as the project control process.

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4. Estimate the "normal" durations of the activities, usually in working days. These duration estimates are based on performing the activities in the most cost-efficient way using the resources that will be available. Allowances are included for common problems that can slow down or interrupt activities. The activity managers' commitment to the duration estimates is at least as important as the estimates themselves. Notice that this estimating process does not take the project deadline into consideration. In other words, you should not back-schedule from the deadline to force the schedule to meet the deadline. The back-scheduling approach may produce a schedule that looks acceptable on paper, but for several reasons, such schedules seldom lead to project success.

5. Perform initial scheduling calculations. This is where a project management software tool becomes helpful, although the calculations can also be done manually. Among other information, the calculations will determine the initial duration of the project, which is often too long to meet the deadline. The calculations will also reveal the series of activities through the project network with the longest total duration. This "critical path" drives the duration of the project. Knowing the location of the critical path is essential to effective project planning and control.

6. Compress the project duration to meet the project deadline. This process involves finding ways to compress the durations of selected activities. Of course, the activities selected for compression must be on the critical path. Other criteria are also used in selecting the activities to be compressed, such as activities with relatively long durations, activities that occur early in the project, and activities that are under the direct control of the project team. Cost trade-offs are explicitly analyzed in this compression process. Having the project team participate in selecting the activities to be compressed and suggesting ways to compress the activities maintains their commitment to the schedule.

7. Develop the project budget using a bottom-up approach. Estimate the cost of performing each activity (labor, materials, contractors, travel, etc.), plus the cost of project overhead (project management expenses, interest on project loan, etc.). This approach to project budgeting supports effective cost control. Since the budget contains an amount for every activity, you will know whether you are on budget as you complete each activity. This approach also allows for the development of cash flow projections for the project.

This (or any) approach to project planning requires an investment of time by the project team. But the investment will be repaid many times over through the prevention of problems that would otherwise occur. Plus, the planning process becomes more efficient as people in your organization gain experience in using it and planning templates are developed for your most common types of projects.

If you don't care about wasting time and money, don't bother to plan your project. But if you want to be successful and you recognize the importance of planning, the project planning process described here works every time!