

San Pasa's Tips on
PLANS and PROJECTS
(in alphabetical order)

“Congruity of short-range decisions and long-range plans demonstrates management commitment.”

(Source unknown)

1.0 A GENERAL MODEL FOR THE PLANNING PROCESS

- Always involve the right people at the right time in planning.
- Define and organize the activities to be accomplished and their tasks.
- Define roles and responsibilities of those involved on the process.
- Define the goals and objectives of the plan.
- Identify dependencies and describe contingencies.
- Monitor action against plans and report progress and problems.
- Remember to adjust plans and actions throughout a project.

2.0 SOME BENEFITS OF THE PLANNING PROCESS

- Clearer recognition of problems and opportunities.
- Expression of new ideas.
- Identification and expression of immediate, medium and long-range objectives.
- Identification of and increased insight into potential problems.
- Improved quality of products, services and processes.
- Information useful in decision-making.
- More adaptable organization.
- Prevention of some (not all) unpleasant surprises.

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- Sharpened management insight.
- Valuable communication tools and opportunities are created.

3.0 MAJOR PLANNING PITFALLS

- Assuming planning is *separate* from overall management.
- Attempting to delegate planning to people *not responsible for the results* of plans.
- Failing to create an atmosphere conducive and congenial to the planning process.
- Failing to develop objectives suitable for formulating plans.
- Failing to involve the right people at the right time in the planning process.
- Failing to review plans with planners.
- Failing to review plans with those required to execute plans and to meet plan requirements and objectives.
- Failing to revise and maintain plans.
- Failing to study “lessons learned” and/or failing to learn from past planning mistakes and failures.
- Failing to use plans as part of standards for measuring performance and progress.
- Neglecting planning because of engrossment in current problems (for example, “firefighting”).
- Replacing formal planning processes and plans with overriding “gut,” “political” or emotional decisions.
- Requiring so much formality that the planning process becomes cumbersome and costly and lacks flexibility, simplicity and creativity.

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4.0 PLANNING DON'TS

Don't:

- Attempt planning without those involved really understanding how the planning process works and the value of planning.
- Avoid planning because there have been some apparent successes without formal plans or without some kind of planning process.
- Be overly optimistic or overly cautious—strive, instead, for the “golden [realistic] mean.”
- Consider plans as unchangeable blueprints.
- Discard planning because of previous planning or project failures.
- Expect good long-range plans from people whose are evaluated solely on short-range performance.
- Expect overnight results or miraculous outcomes from a planning process.
- Fail to include the people responsible for the action (real work) in plan reviews.
- Focus attention only on short-range objectives and decisions.
- Ignore existing power structures.
- Ignore political, social or other nonrational factors.
- See the numbers and statistics in plans as sacred or as more important than other elements of the plan.
- Send plans to “file” and ignore them when the action really starts.
- Try to do too much in too short a time.

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5.0 PLANNING DO'S

Do:

- Apply cost/benefit analysis to the planning process itself—adjust the process to make it economical, for example, eliminate the use of complex, high overhead “planning” software for small projects that don’t need it.
- Be tough and realistic when reviewing and analyzing plans.
- Carry out “post mortems” on plans.
- Consider carefully the qualifications, roles and placement of people doing planning, especially the chief planner and/or the person responsible for coordinating all of the elements of a plan when the actions starts.
- Develop planning skills *throughout* the organization, not just in “planners.”
- *Expect changes:* in the location of decision making, in participation in decision making, in authority relationships, in the flow of information, in management and other processes, in performance and attitudes. Published plans that are *used* change dynamics in an organization.
- Find the right planning process to fit the situation, for example, simple, complex, automated, limited to a few people, involving many people, etc.
- List and examine assumptions.
- List and examine contingencies and consider how they are to be addressed.
- Make sufficient information available for meaningful planning—don’t hide important facts affecting the project being planned.
- Plan to plan.
- Promote continuing dialogues about published plans and keep people informed of progress and changes in plans.

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- Provide a clear, documented, easily understood description of the steps in the planning process.
- Reexamine and reappraise current management planning practices and decision making processes.
- Relate planning to the real world of current operations and “reality test” plans regularly with the people “on the ground.”
- Rethink long-range plans each annual planning cycle.
- Take some deep breaths and relax periodically.
- Use past successful plans to stimulate thinking about current planning.
- Use the planning process as an opportunity to improve management throughout the organization.
- Weight and rank goals and objectives as to their relative importance in the context of planning assumptions.



PROJECT CONTROL REMINDERS

Work Proverb: A complex system that does not work is invariably found to have evolved from a simpler system that worked just fine.

“The Office” Calendar

1. Realistic project schedules require. . .

- breaking down activities into to logical sets of tasks (where a “task” is an easily understood set of things to do that can be accurately estimated)
- considering the usual factors that affect schedules—for example, holidays, vacations, work schedules and overtime, skill levels—and considering factors unique to your organization or work environment, for example, statutory

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- requirements, imminent collapse of current computer application systems, availability of specially qualified people, money “crunches”
- estimating tasks in workdays or workhours
 - identifying all the work to be done, including customer (user) tasks, such as reviews and approvals
 - organizing project work into logical sets of related activities
 - specifying the *dependencies* between activities (and, if necessary, between tasks)

2. Some scheduling reminders. . .

- **Estimating.** Estimates are as good as the estimators. Two or three estimators working together are usually better than one estimator working alone. Estimates at the detail level of work to be done (that is, the task level) tend to be more accurate than estimates for “high level” activities. *New* estimates and schedules or *confirmations* of previous estimates and schedules should be provided at the end of each phase of a project, along with task-level estimates for the *next* phase of a project. “Ballpark” estimates (by an experienced estimator) are better than no estimates at all—as long as they are confirmed and replaced by more detailed estimates.
- **“Miscellaneous time.”** When creating project schedules and estimated completion dates, don’t forget to consider management and customer (user) review and approval cycles, documentation and publishing time, process “wait” and turnaround times, and other activities that consume calendar days but not necessarily team workdays.
- **“Sphere of influence.”** Sometimes, there are factors outside a project manager’s direct control, such as vendor or supplier performance, site acquisition or site preparation delays, equipment failures and Acts of God—good contingency plans can help minimize slippage from these and similar “fuzzy” factors.
- **Who is at fault?** Playing “blame game” when schedule slippage occurs is far less productive than identifying the causes of the slippage and taking corrective action to keep a project on track. Schedules have slippage—learn to work with it.

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3. *Timely, meaningful budget and cost tracking requires. . .*

- Appropriate action when costs *first begin to get out of line* with estimates and budgets
- Regular, detailed reviews of time and costs reported
- Time and cost estimate verification *or re-estimations* by task and then by activity
- Timely and accurate expense recording and reporting within a pre-established project budget scheme
- Timely and accurate time recording and reporting by activity and, if needed, by task

4. *Project status reports should. . .*

- Be clear, concise and free of “theology” (rationalizations and excuses)
- Identify unsolved, continuing or anticipated problems and recommend action
- Indicate if management and customers (users) are in the process of doing reviews and approvals and when those actions are expected to be completed
- Match the structure of the project, that is, reporting should be by activities or, if necessary, by tasks already identified planned, estimated and scheduled—an “action item” section of the report can cover the inevitable “miscellaneous” items to be reported
- Not be so frequent or complex as to become a major overhead factor for a project manager—but be frequent and complete enough to allow for timely review and action (try twice a month, at first)
- Show distribution (who got the report)
- Show work done, work in progress and work to be started

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- Tell **what** (activity or task), **who** (the team members responsible), **when** (scheduled and/or estimated completion dates) and **why** (if an explanation of status is needed)

5. A few last-minute reminders. . .

- Depending on the size and number of projects under way, it may be worth designating a project methodology “watchdog” to ensure, for example, that project managers are not bogged down by unnecessary overhead, derailed by communication problems (up, down and laterally), or distracted by unnecessary meetings or “outside” interference.
- If you don't make *timely decisions*—such as “freezing” design specifications—or if you don't conduct reviews and approvals when scheduled, you can't expect projects to be on schedule.
- Prior agreement on standards to be met and levels of quality to be achieved helps keep a project on schedule.
- You can't meaningfully measure performance if you can't match the *actual* results against *planned and estimated* work.
- You can't monitor progress unless you establish a review process that examines deliverables and performance against project plans, schedules, budgets and estimates.



“People would rather live with a problem they cannot solve than accept a solution they do not understand.”

(Source unknown)

End.