The *vision* to stay ahead

Planning – Back to Basics

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Aspire Europe Ltd has been at the heart of developing best practice. Work on maturity assessments using P3M3® has shown that many organisations have a fundamental weakness when it comes to planning their changes.

Based on these findings, the P3M3® Lead Author, Rod Sowden, goes back to some basics concepts as a reminder.

Planning is one of those areas of programme and project management that excites some people and fills others with dread. Our work on undertaking P3M3® maturity assessments has shown that, overall, most organisations are weak in this area.

Why should this be? The common project management qualification courses focus heavily on planning techniques and controls. Yet, when people return to work it all seems to be forgotten. You won't get through a PRINCE2® examination without knowing about product flow diagrams or product descriptions and you won't get your APM qualification without being able to develop a critical path analysis. It seems these are techniques that are only used to pass exams, yet shockingly, they existed before the exams.

> "Creative minds have always been known to survive any kind of bad training." - Anna Freud

Part of the problem seems to be the tools. When we ask on a review, "What planning standards do you use?" it is amazing how many people say MS Project. Often such tools encourage the thinking process of "what do we need to do", and "how do these things link together", whilst good planning practice starts with "what do we need to create".

For many, the logic of creating a "to do" list seems to be easier than using the techniques that will create a more robust output-based plan.

When investigating why such techniques are not used we have often found a lack of clarity about what the project is expected to deliver. It is very difficult to create a PRINCE2® Project Product Description without any Requirements to provide you with the detail, yet many of the project lifecycles we have reviewed don't have this step within them. Organisations using PRINCE2® are particularly prone to this as they don't recognise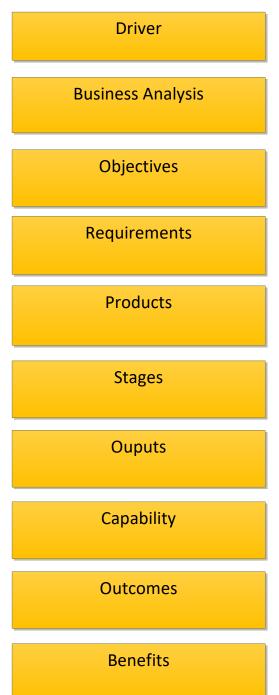 the significance of the link between Project Product Description and Requirements Definitions, which admittedly PRINCE2® doesn't elaborate on.

> "When you cannot get a compliment any other way, pay yourself one." - Mark Twain

In many organisations priding themselves on their professionalism of project management, the situation is much better, whilst for organisations where project management is not at their core, project managers who produce a good plan aren't recognised or rewarded by their peers or line managers. These skills are key to reflecting the level of maturity. If the sponsor, or your boss, doesn't know what a good plan looks like, I suspect some of you will be saying "What is the point creating one?" It's all about professional pride and being objective.

We have put together this 'Back to Basics' briefing to support our Planning Principles training courses, to try to pull together some of the terms and put some order and sequence around the planning steps and pull some of the key concepts together as a reminder. We could write an entire book on this (many have!) but it is only intended as a refresher.

| Driver |
| Business Analysis |
| Objectives |
| Requirements |
| Products |
| Stages |
| Ouputs |
| Capability |
| Outcomes |
| Benefits |

Planning is a process that continues through the life of a project. The plan is not something that is created at the start of the project and then left to gather dust on a shelf. Its maintenance is at the heart of good project management. Without a plan a project will become a set of random activities that <u>might</u> produce something of value at some stage.

The project should be commissioned in response to a business driver, perhaps a threat or an opportunity that has been identified. This should trigger business analysis work that develops the understanding of the driver and the likely effects this will have on the business operations. Derived from this will be the business benefits that will justify the project and lead to identification of the project's objectives.

These objectives are critical, as they will set out the scope and the expected benefits that will be gained from investing in the project. The first step for the project should be to seek clarification of what success will look like, specifically the critical success factors. It is useful to have objectives that relate directly to the drivers as these will bring clarity and transparency to stakeholders. Additional business objectives that outline how the outputs will be used to achieve outcomes and to realise benefit, and thereby achieve specific project objectives will help keep the project focused

Establishing the Requirements is the first step, and an area that is often overlooked. If you don't have a clear understanding of what the project is required to deliver, the chances of success are minimal.

Once these Requirements have been defined, the next step is to produce constituent "Product Descriptions". Products are the anticipated outputs of the project. Product Flow Diagrams are part of this, so that you can build an understanding of the interrelationships between the various products. The Product Description describes how the Requirements will be met, and the quality criteria against which each deliverable can be measured. From this information, you can add activities and use techniques such as Critical Path Analysis to understand where you have flexibility in the plan, undertake your three-point estimating in terms of effort and timescales, and allocate any resources. Before you know it, you will have a robust plan.

Creating the project's Product Description is a key part of delivery and much of your plan will focus on delivering this. Design, development and testing are critical elements in any project. This may be created in-house or procured in some way, dependent on what the product is. Delivery will normally be made up of a number of stages that will enable control and management of the project.

On completion, the constituent products and then the overall project are tested and should be ready for acceptance and approval.

A new "Capability" is achieved when all project outputs have been completed and are ready to move into live use in the target business environment. At this point the

> **Schedule Control**
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> 1. Analysing the schedule to determine which areas may be need corrective action.
> 2. Deciding what specific corrective actions should be taken.
> 3. Revising the plan to incorporate the chosen corrective actions.
> 4. Recalculating the schedule to evaluate the efforts of the planned corrective actions.

investment may well have been fully committed, so the organisation no further budget available. As it is still, in effect, awaiting approval to put into use, the organisation may choose not to go ahead and mothball the outputs. Hence, this state is referred to as Capability as opposed to Outcome. For example, an IT system may be tested and ready to go, with everyone trained, but due to unforeseen problems with something else, the live date is postponed.

The Outcome is the point after transition has been delivered, when the new ways of working are in place, the business has changed the way it delivers its services, and it is now stable again. You would

> "To stimulate creativity, one must develop the childlike inclination for play and the childlike desire for recognition."
> - Albert Einstein

be looking to have final sign off at this point.

Benefits should follow, but these will be within the domain of the business areas themselves, and normally be outside the scope of the project team, although PRINCE2® and other guidance suggests the ongoing responsibilities of the Executive/Sponsor and Senior user in this respect. However, decisions during the project will be driven by benefits and in fact, the project only exists because of approved benefits as highlighted in the Business Case.

In conclusion, for some of you this may have been included statements of the blindingly obvious, but for others we hope that it provides a useful reminder of how all the elements you may have learned on your training courses fit together. If you haven't learned these in the past, let us know, we have face-to-face training and eLearning services that will help fill in the gaps.