Project management 101 *by Zavanak*

15. PLANNING

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15.1 Why planning is vital

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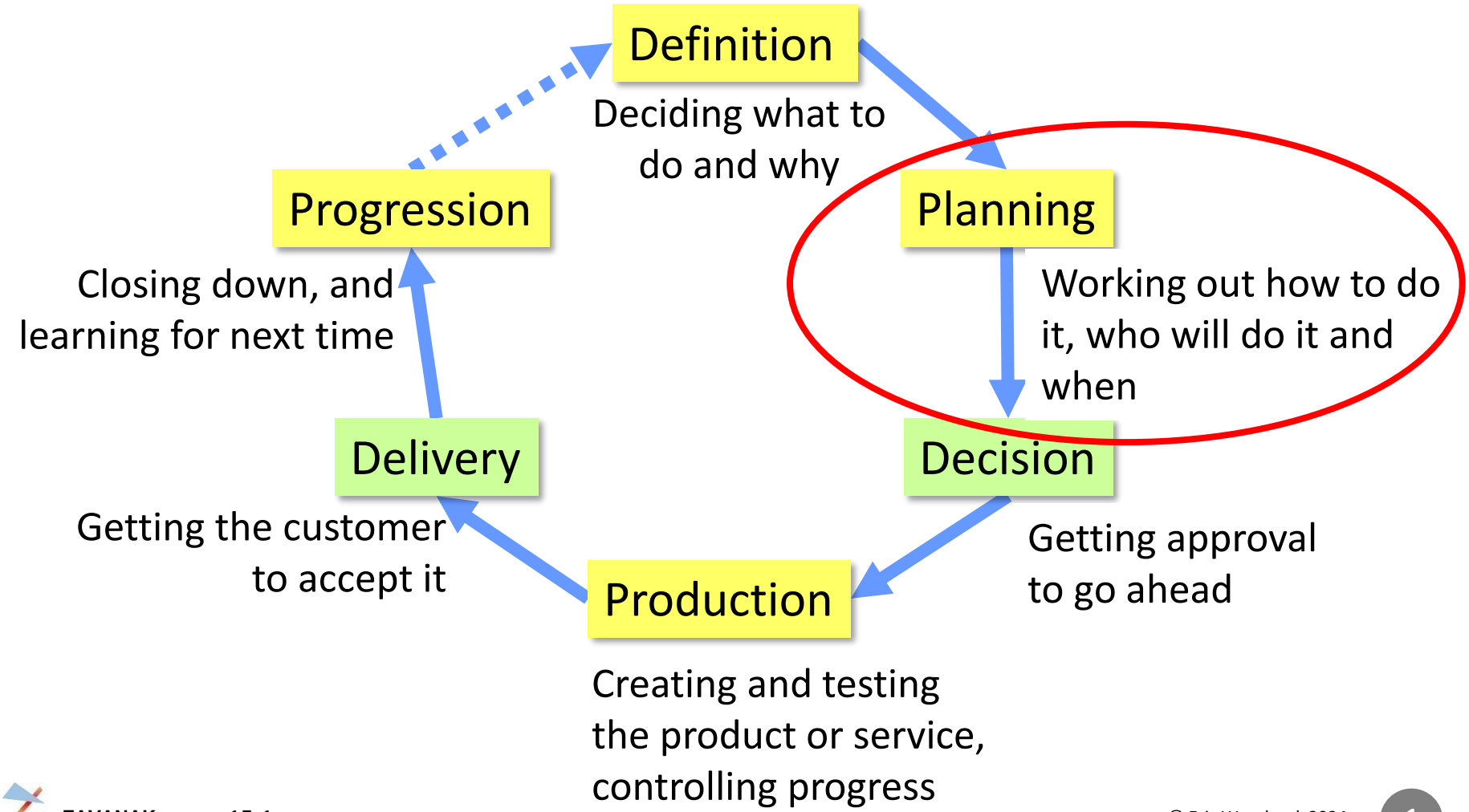
The planning phase



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Why a project needs a plan

The planning process forces us to think hard about what we need to do.

The plan shows how we will reach our goal.

It accurately defines the time, cost and resources required.

It enables us to allocate and organise resources in a logical manner.

It gives us a way to manage activity and measure progress.

It convinces stakeholders we are competent for the job.

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What the plan does

The planning process fosters a common understanding of what has to be done.

The plan breaks complex activities into manageable chunks and gives a project overview.

It provides a logical basis to make decisions, and allocate resources.

It gives a schedule for the delivery of the output (or outputs).

It defines the logical sequence of activities, and the basis for work organisation.

It filters out frivolous ideas and activities.

It provides a baseline so that revisions and refinements have a clear starting point.

It shows when working capital is needed to fund activity.

It shows the project's effect on other projects, operations and systems.

It makes clear details which are central to the contract between supplier and client.

Failing to plan is planning to fail. *

* Attributed to Alan Lakein.

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Goals, objectives and requirements

The **goal** is the change the project is intended to help bring about, i.e. the **outcome**.

The **objective** defines what the project will produce in terms of output, learning, time and cost parameters, etc.

Requirements

- SPECIFICATION: the definition of the project output and what it will do
- SCOPE: the way the project will deliver the output.

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Project planning

Project brief – Defines the goal and requirements of the project, the outline business case, and customer's quality expectations

Business case – justifying the project as the best way to attain the strategic goals

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The business case

The business case evaluates whether the forecast effort and time will be worth the expense; and whether the desired benefits are worth the risks to achieve them.

Business case – justifying the project as the best way to attain the strategic goals

- Reasons for the project
- **Stakeholder interests**
- Options analysis – including do nothing
- **Benefits expected – measurable**
- Project outline
- **Key risks**
- Costs
- **Time scale**
- Investment appraisal
- **Evaluation**

- If the business case **cannot be made**, the project must not be allowed to start.
- If the business case **changes**, the project must be reviewed and modified.
- If the business case **ceases to exist**, the project must be stopped.

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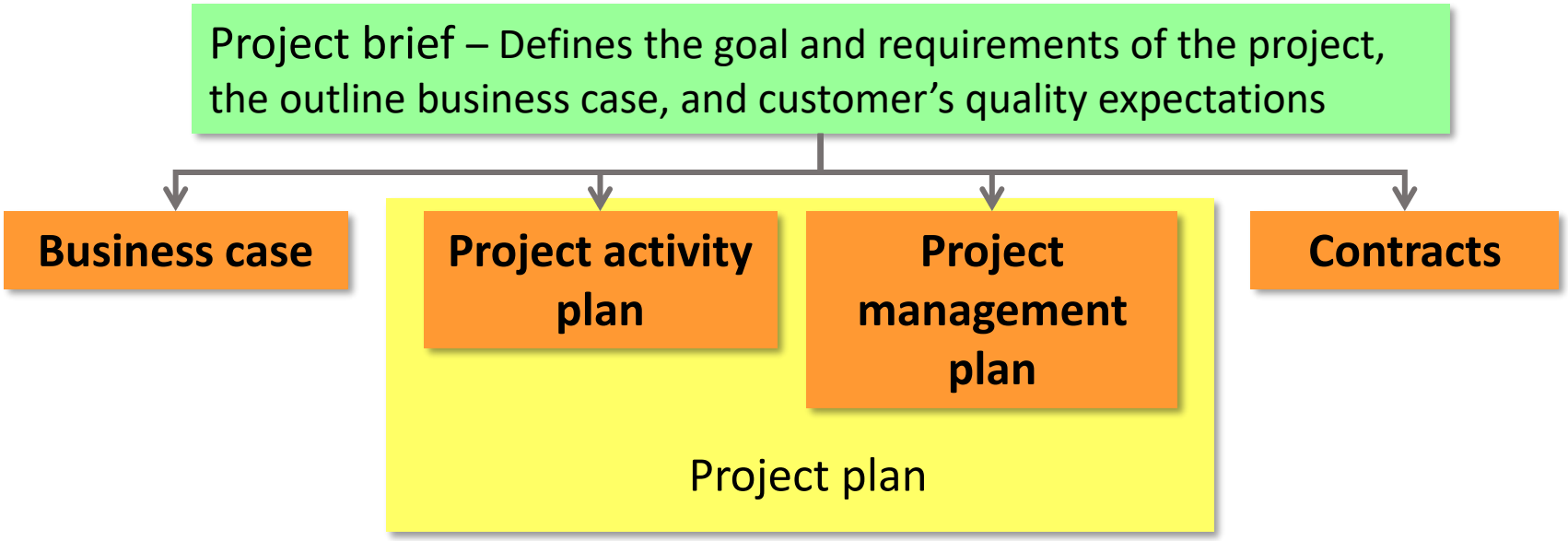
Project planning



Project Initiation Document

Statement of Work

The detail in the plan will reflect the scale, risk and cost associated with the project. Not too much on a small, easy project, not too little on a big, risky project.

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What is in the project plan?

Project activity plan

Overview of the project
Goal and objectives
Output specification
Project scope
Time, cost and resource estimates
Milestones and gateways
Phased budget schedule
Roles and responsibilities
Key project personnel
Risk register

Project management plan

Organisation and facilities
Client-side project arrangements
Governance arrangements
Monitoring and reporting arrangements
Issue and exception management plan
Risk management plan
Change control procedures
Stakeholder engagement plan
Quality assurance and control plan
Environmental management plan
Contingency plans
Criteria for project evaluation
Document management plan

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A project plan needs to be:

Explicit	Able to identify task logic, activity durations, milestones and resource requirements
Intelligible	Easily viewed and interpreted, using language the relevant audiences will understand
Able to be monitored	Able to be examined to see what current or future action is planned. Input of progress information should be straightforward to do
Able to accept change	Able to be modified to cope with changes and issues that arise as the project proceeds.

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