

Project Planning in Context

A high-level approach
to Project Planning
and Management

By Stephen Smith



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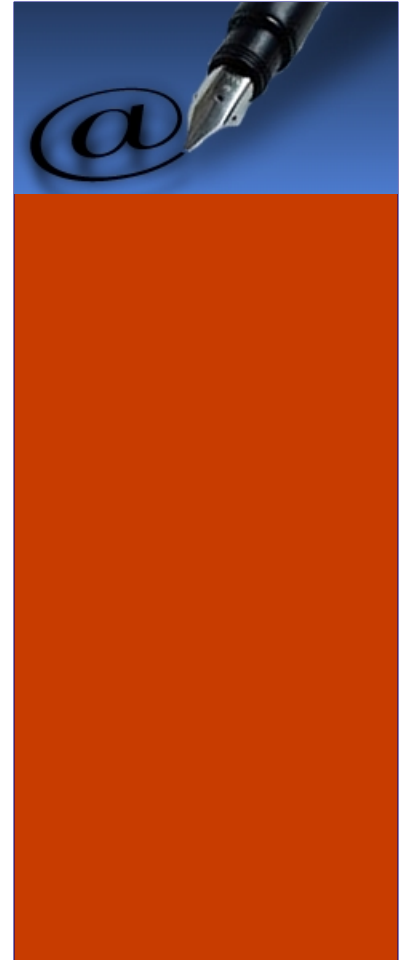
Stephen Smith

Productivity in Context

<http://www.hdbizblog.com/blog>

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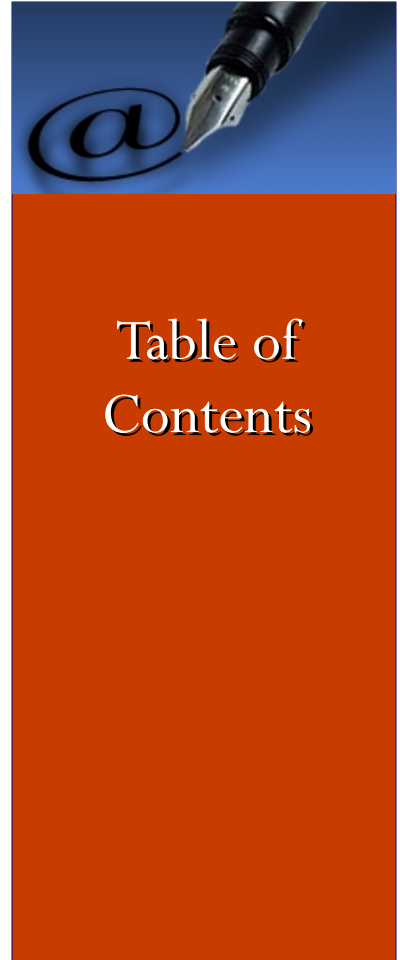


Table of Contents

1. Introduction	4
2. The Basics of In Context Planning	6
3. Quality In Context.....	9
4. What a Project is, and isn't	12
5. Time, Cost, Scope, Quality	14
6. Balancing Project Contexts	19
7. What Happens When it's Over	20
8. Brainstorming	22
9. Keep Everything In Context	24
10. It's Your Execution	25
11. What Comes Next	26
12. Appendix	27

"Success comes quickly to those whom develop great powers of intense sustained concentration. The first rule is to get involved by asking focused questions." (David Kekich)

Project Planning - In Context

The **In Context** Project Planning process discussed in this E-book is the result of studying the most useful aspects of the wide range of project planning resources available.

I should have done this years ago, and the facilitators of countless planning sessions that I have had to endure may have had more success.

The primary advantage of using this process is that no special equipment or expensive training is required. Rather, changing your own thinking and learning to follow a simple process can make project planning a joy (or at least more enjoyable) rather than a modern form of torture. The irony of this process is that the steps are so simple, anyone could have done it!



Introduction

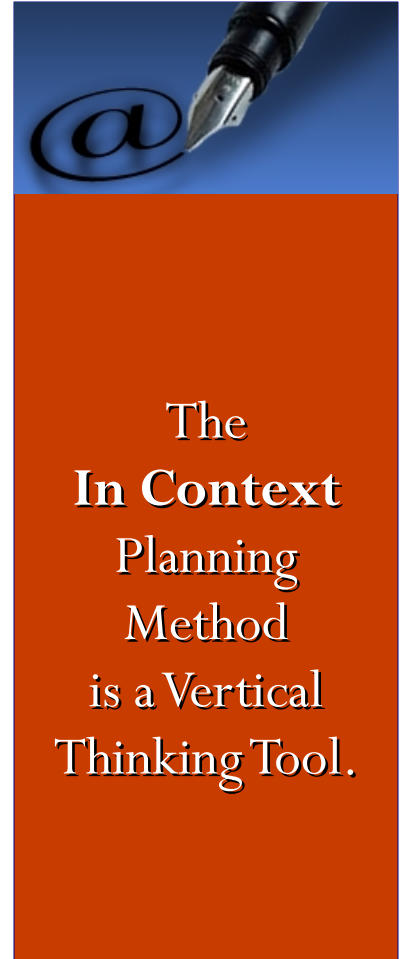
Vertical Thinking for Serious Planning

Before I “got serious” about studying productivity methods I did not believe that I had any projects that were "serious" enough to warrant this kind of high-level thinking and elaborate planning.

On the contrary – the **In Context** method is simple and straightforward, both to follow and to implement. It can be used for large-scale, team-driven projects or your next blog post.

In creating the **In Context** planning process for projects large and small I have learned to simplify my own project tracking and improve the completion rate.

A rewarding consequence has been to watch my Long-term Goals become shorter-term. Vertical thinking, *really contemplating the issue at hand*, and how you will get from point **A** to point **B** is essential to the success of a project. **In Context** planning will get you there.



The Basics of In Context Planning

There are five basic phases in this planning model, each of which will be examined in turn:

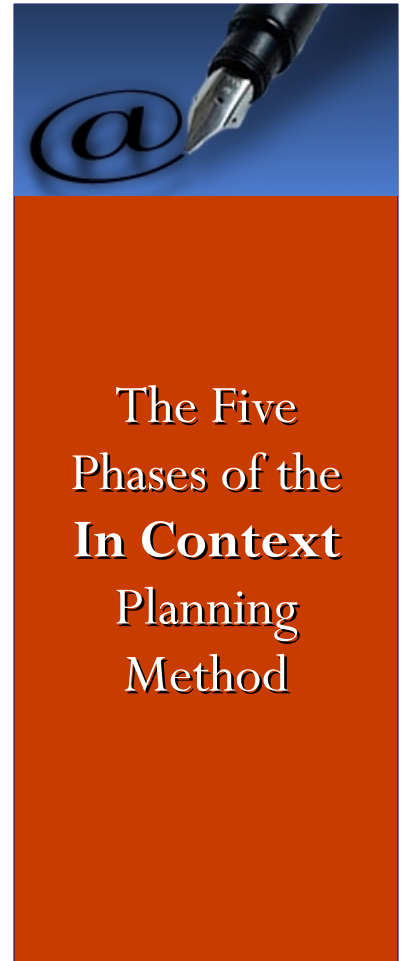
- Define the Need behind the Need**
- Envision the Result**
- Brainstorming**
- Organizing**
- Identify and Assign Tasks**

Adopting this method and thoroughly completing these phases, in this order, may seem like common sense. Yet, how many of you have been trapped in "planning sessions" where common sense had apparently been tossed out the window?

Where no actual planning got done?

Where you left the session feeling defeated and demoralized?

With less of an idea of what you were supposed to accomplish than when you went in?



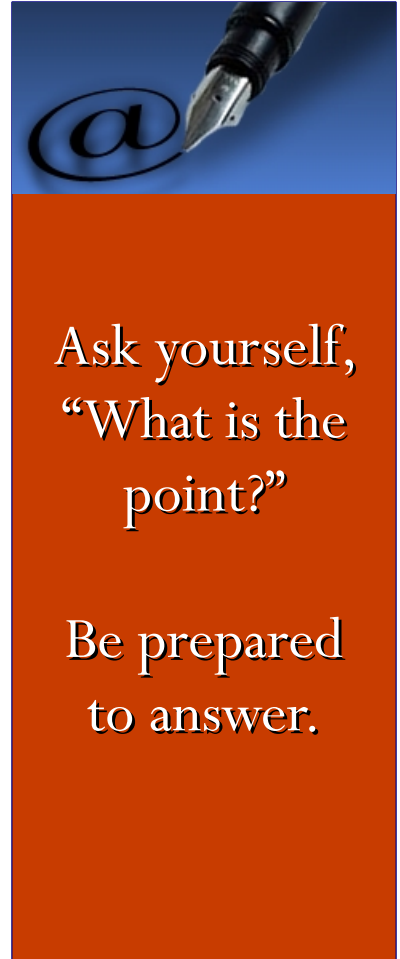
Define the Need Behind the Need

A common mistake in project planning is to simply throw together a quick to-do list with only a vague idea of exactly what you want to accomplish.

Project planning is greatly enhanced by the use of high-level thinking regarding the real essence of what you are working to accomplish.

Getting the "big picture" view of the current project or situation will aid you in determining the "***need-behind-the-need***", answering the question, "**Why are we working on this project in the first place?**"

If you do not know why you are working toward a particular goal you can never get there. You will certainly never persuade anyone else to follow you into that darkness.



Ask yourself,
“What is the
point?”

Be prepared
to answer.

Anything worth doing is ...

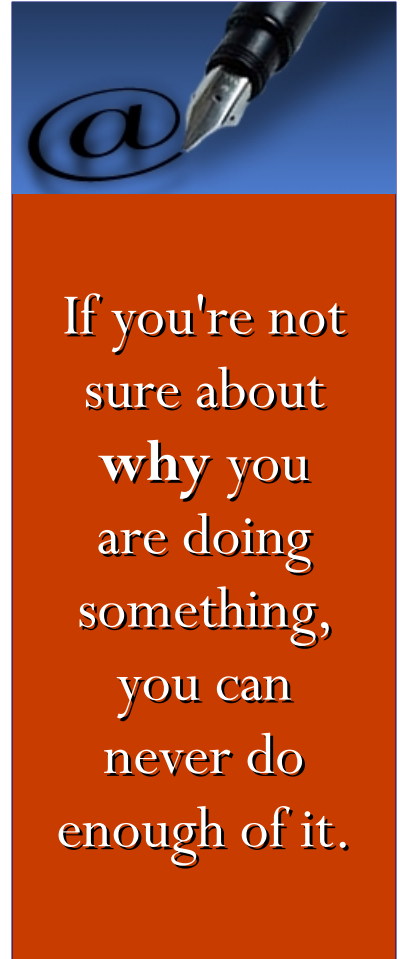
Asking yourself, your leader, and your team about the "**Why**" of a project is essential to discovering if the project is worth doing. A project should be an investment that has a measurable return.

What terms will the cost of this effort be measured in - time, energy, expense, quality? What will be the result?

Who is going to pay the price?

When you, your leader, and those you are leading all understand the value of the project it creates something priceless - **motivation**.

Creating enthusiasm for the execution of the project creates a stimulus for doing the hard work of proper planning. Otherwise, it's like pushing a rope.



If you're not
sure about
why you
are doing
something,
you can
never do
enough of it.

Quality In Context

Once you have determined that a project is worth doing, you will need to decide upon the values and principles that will guide you through to its completion.

Depending on the type of project it is, there are certain principles regarding timeliness, cost, scope, and quality that you must evaluate. Are there principles that you are willing to compromise in order to meet a deadline?

Which of your principles cannot be violated?

Once you have begun to execute your plan, it is likely that you will encounter obstacles and unexpected difficulties that require making adjustments to the plan.

Your principles will determine how these changes are incorporated once the project is underway. Who will review and approve these changes?

Are there naturally occurring points in the plan where decisions about changes can (or must) to be made?



No plan
ever survives
its first
contact with
“the enemy”.

There is no such thing as a free lunch

Including resource allocation into your project plan is essential to its success. So many projects are begun and later abandoned because proper attention to the required resources was neglected.

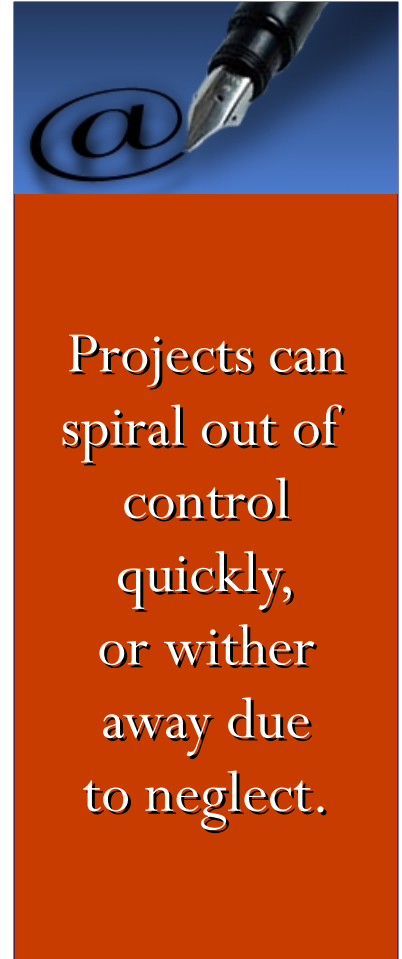
On the other hand we have seen the costs balloon out of control, and projects take on lives of their own. Look at the Big Dig in Boston.

People, money, and time are the most common resources that are “spent” on a project. Investigate which others you may need.

Is there a dedicated workspace or new piece of machinery/ equipment that must be obtained? How do you get the approval?

Does a larger budgetary consideration affect the status of your project?

Do you have to compete with another group for resources?



Projects can spiral out of control quickly, or wither away due to neglect.

Your Principles Are Your Compass

The plan that you are creating is the vehicle that carries you to success.

The “**Why**” of your project is the roadmap that indicates the destination you are heading toward. Clearly defining your purpose makes it possible for you to communicate your goals to your team, or those who will ultimately be implementing this plan.

Your principles are the compass that keeps you pointed in the right direction.

This combination of tools and your open communication will make it possible to monitor your progress and detect when the project may be getting off-track or bogged-down.



With a
compass and
a map you
should be
able to get
where you
want to go.

Defining Your Terms

Successfully completing a project typically requires that you complete a set of tasks on time, within budget, and that your customers are happy with the end result.

That sounds simple enough, but how many projects have you worked on in the past that were completed late, or cost too much, or didn't meet the needs of the end users?

Let's walk through the definition to clarify what a project is and is not.

A project is temporary. The duration might be just a week, or it could go on for years, but every project has an end date. This is the essential difference from an ongoing operation, though the two have a lot in common.

Ongoing operations, as the name suggests, go on indefinitely.



Projects are not Accidents

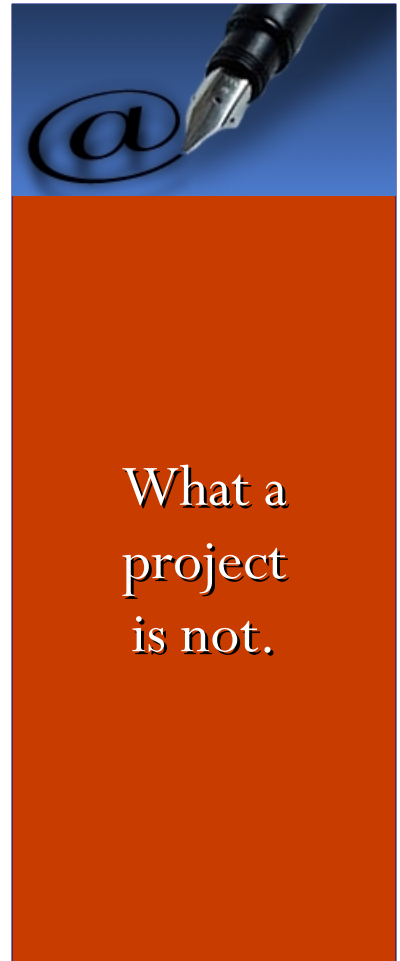
A project is a set of actions that consist of a series of intentional, planned events. Successful projects don't happen by themselves, some amount of preparation and planning happens first.

A project creates a unique product or service. This is the deliverable. The deliverable is a tangible or measurable result or outcome, or an item that is produced to complete a project or part of a project.

This is generally the reason that the project was undertaken.

A project is not (well, it shouldn't be) just a resource-grinding exercise in futility.

Unless a Government Agency is involved. Then all bets are off.

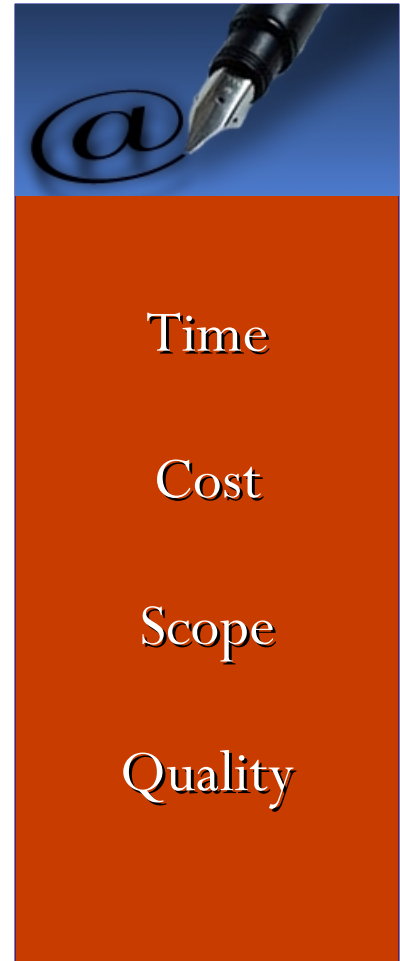


Four Contexts of a Project

You can visualize project work in many ways, but there are four Contexts common to all projects:

- Time** - some element of a time constraint set on the start or finish date of a task. You can specify that a task must start on or finish no later than a particular date. The time constraints can be flexible [not tied to a specific date] or inflexible [tied to a specific date].
- Cost** - some type of budget the estimated cost of a project that you establish in your basic plan.
- Scope** - the combination of all project goals and tasks, and the work required to accomplish them.
- Quality** - the successfulness of the completed program.

If you adjust any one of these Contexts, the others are likely to be affected. For example, if you adjust the project plan to shorten the schedule, you may need increase costs to maintain the scope or change the quality of the result.



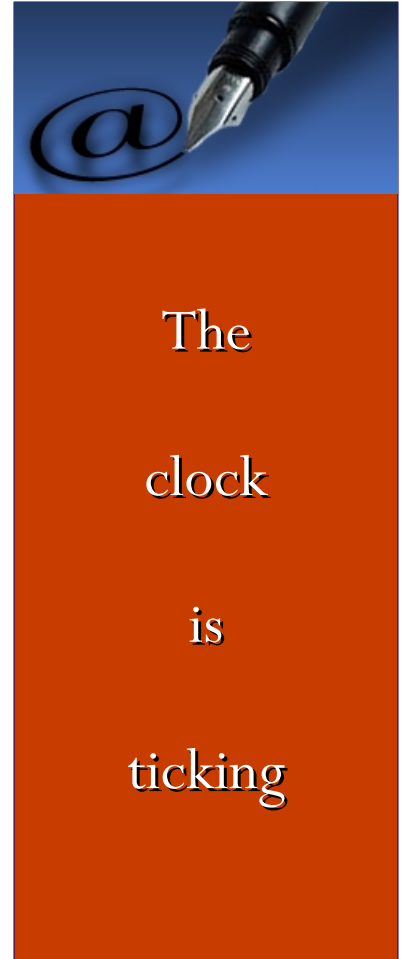
Time

Limited time is the one Context of any project with which we are all probably most familiar. If you're working on a project right now, ask your team members what the project deadline is. They might not know the budget, quality details, or the entirety of scope, but chances are they all know the project deadline.

Here are some examples of time constraints:

- You're building a house and you must finish the roof before the rainy season arrives.
- You are building a new website for a sales program that starts in two months.
- You are developing a new inventory tracking system that must be tested and running by the start of the next fiscal year.

Most people have been trained to understand the value of time and for many projects that create a product or result in an event, time is the most important Context to manage.



Cost

You might think of cost simply as dollars (or pounds or marks), but project cost has a broader meaning. Costs include all of the resources required to carry out the project. This include the people and equipment who do the work, the materials they use, and all of the other events and issues that require money or someone's attention in a project.

Here are some examples of cost constraints:

- You have signed a fixed-price contract to deliver a proprietary software system to a client.
- The marketing director of your organization has assigned you to carry out a customer research project using only the existing staff and equipment in your office.
- You have received a \$5,000 grant to create a training program. You have no other funds.

For virtually all projects, cost is ultimately a limiting Context; few projects can go over budget without eventually requiring corrective action.



Scope

Every successful project produces a tangible item, a measurable result, or a service. You might develop some products for one customer you know by name. You might develop other products for millions of potential customers waiting to buy them (at least that is the plan).

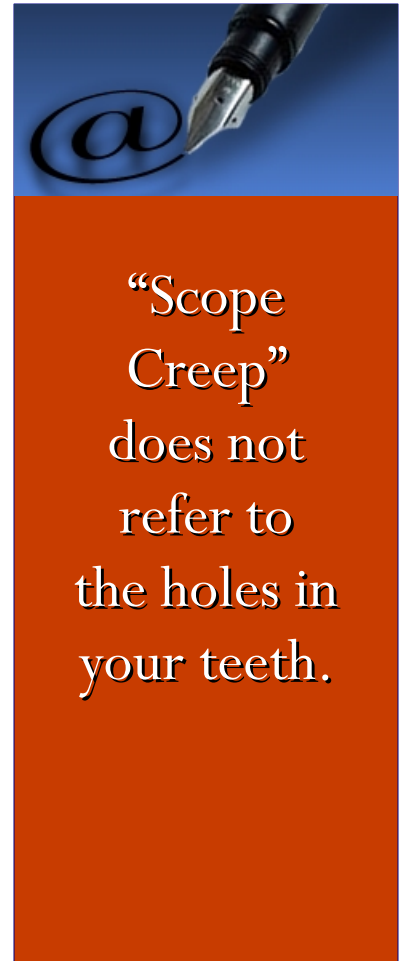
The scope of a project describes the work required to deliver a product or a service with the intended quality.

Project scope is usually measured in tasks and phases.

Here are some examples of scope features:

- You are constructing a building on a lot that has a height restriction of 50 feet.
- You can use only internal services to develop part of your product, and those services follow a product development methodology that is different from what you had planned.

The scope of your project must be managed like any other Context, as they are all related in their impact on the deliverable.



Quality

Customers usually have some expectations about the features and functions of products they consider purchasing. The quality of the project's deliverable will have a distinct measure.

The quality of a project deliverable is in the intended features and functions of the product—often described by the customer in minute detail. Documents that outline this information are generally called product specifications.

A service or an event usually has some expected features as well. We all have expectations about what we'll do or see at a party, a concert, or a sporting event.

An example of a quality feature:

Your organization won a contract to develop an electronic component that has exact requirements—for example, physical dimensions measured to 0.01 mm. This is a quality feature that will influence project scope plans, time restrictions, and the final cost.



Quality is not
job one,
being totally
f***ing
amazing
is job one!

Hugh McLeod
www.gapingvoid.com

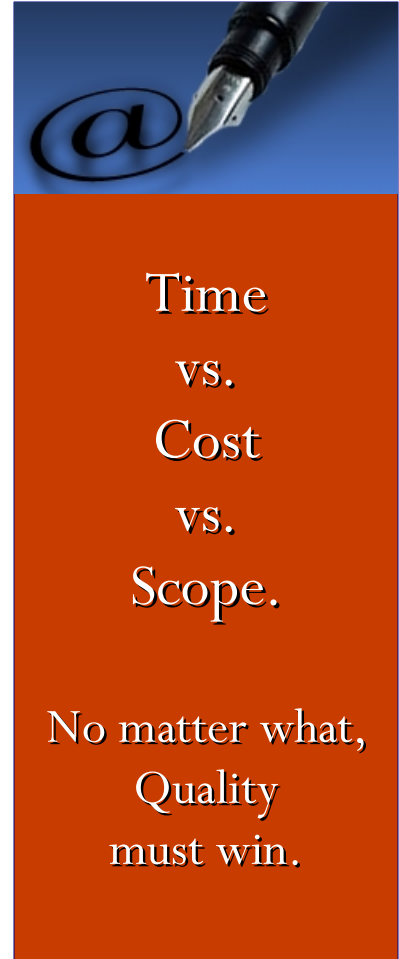
Balancing Project Contexts

Project management gets most interesting when you have to balance the time, cost, scope and quality Contexts of your projects.

For example, if you adjust the project plan to shorten the schedule, you might increase costs and decrease scope or quality. This illustrates the concept of *Balancing your Contexts*, because the four Contexts are connected, and changing one of the features affects at least one other.

Here are some examples of Context balance:

- If the duration (time or scope) of your project schedule decreases, you might need to increase budget (cost) because you must hire more resources to do the same work in less time.
- If the budget (cost) of your project decreases, you might need more time because you can't afford as many resources.
- If your project scope increases, you might need more time or more resources (cost) to do the additional work—that is, when other features (cost, time, quality) are not correspondingly examined and, if necessary, adjusted.
- All of these features need to be carefully balanced so as not to require the altering of the quality standards set.



Time

vs.

Cost

vs.

Scope.

No matter what,
Quality
must win.

Envisioning the Result

“One of the most powerful skills in the world of knowledge work, and one of the most important to hone and develop, is creating clear outcomes.”

~ David Allen, *Getting Things Done*, p. 69

How you envision the outcome of your plan is essential to its final success. If you have a clear vision of exactly what you are working to achieve you can communicate it to the rest of the team.

Your description of the outcome is the final mark on the yardstick that you will be using to measure your progress through the plan's stages. When you have properly defined the outcome of the project you can then create and define specific activities and sub-goals to reach your objective.

What happens when it's over?

Your next step is to set the conditions that define its successful completion.



It's not over
until you
know the
performance
schedule of
the lady in the
Viking hat.

It's Time for the SWOT, Team

If the project has been determined to be worth doing and you have outlined the "**Why**", your next step is to set the conditions that define its successful completion. Here is a short list of questions that can help create the vision of a successful outcome:

- What are our strengths, and how can we leverage them to success?
- What are weaknesses in approaching and overcoming obstacles?
- Are there potential opportunities for changing the plan to meet changing conditions? How might this affect the outcome?
- What might prevent us from reaching the best result?
- What will the success of this project mean in a year? In three years?
- What is the best possible result of the project?

As with defining the need-behind-the-need, having a clear vision of the result can greatly increase the enthusiasm of the participants. Knowing where you are going is always preferable to blundering blindly about.



Brainstorming

There are plenty of tools and methods that individuals and teams can use to capture the potential solutions.

Brainstorming and **Free Association** can be helpful in exploring unexpected problems as well as opportunities.

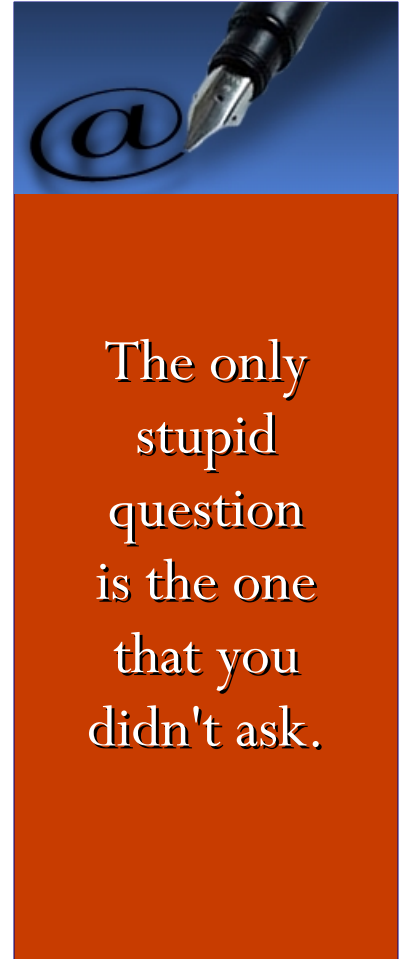
These also happen to be good Team-building exercises which can be very helpful to the overall success of your project.

Getting everyone to participate and contribute to the solutions to a problem raises the level of buy-in and enthusiasm for a project.

Flip-charts come in handy for brainstorming sessions, as they have lots of room for writing down the ideas and suggestions. They are also very handy for mind-mapping, a method of capturing ideas and determining the connections between them.

Often these connections prompt more ideas.

Capture them all, questions and answers!



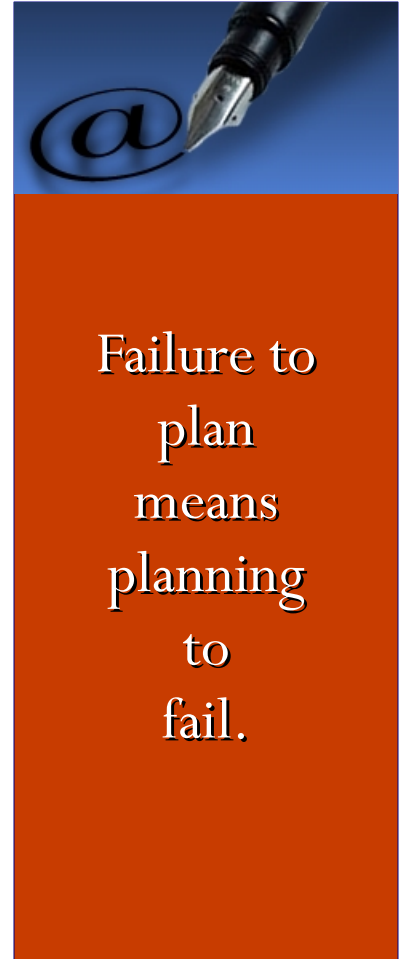
Keeping Everything in Context

Once your project has been identified; you have determined the need-behind-the-need; and a desired outcome has been established, the hard part is over. Now you are ready to get to work. You are ready to take the raw data and turn it into information.

You will create a **Project Plan**:

- Collect each piece of data and group those items that have a commonality, i.e. financial issues, personnel issues, and so on.
- Determine the order that the tasks should be carried out in order to identify bottlenecks and create a timeline.
- This timeline allows you to create the workflow that you will need to implement in order to get the project done on time.

Working back from the expected completion date will show you when the sub-groups need to be completed. The project's timeline will give you a basic tool for tracking your progress toward the deadline.



Organizing Your Tasks

When you first set out to organize the tasks that make up your project, it is best to break the project up into sub-goals with their own deadlines. This will allow you to decide more easily which tasks should get done, and in which order.

Once the sub-goals have been set, you will have a Project Outline that can become a device for tracking the progress of your project.

The Outline that you create should reveal any bottlenecks in the system, so that sub-goals can be re-arranged or re-grouped to avoid the difficulty.

The Outline will also provide a guide that indicates where natural change-points may exist. That is, points on the time line where it is possible or even required to make changes to the plan in order to meet the Cost, Time, Quality or Scope context requirements.



“Entities
should not be
multiplied
beyond
necessity.”

William of Ockham

Execution In Context

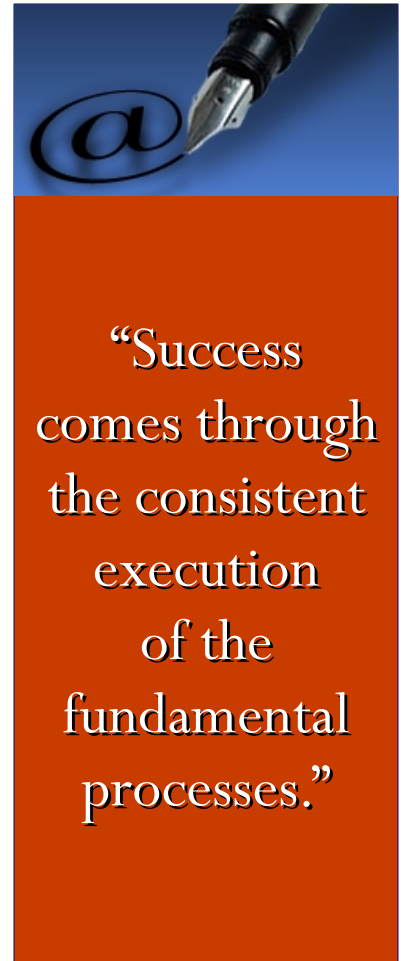
You do not "do" a project, you "do" an action. Your Project Plan will ultimately consist of lists of actions to be executed in chronological order.

In order to reach your ultimate goal and actualize the "Why" of your project you will need to analyze each sub-goal. Determine the set of component actions for each piece or manageable chunk:

- List the goals in order according to the timeline
- List the actions in order according to each goal
- Assign responsibility for each sub-goal and action
- Determine the budget for the process
- Define reporting conditions and tracking methods
- Determine the final deadlines for each action and sub-goal

The timeline is your guide, *but it is not a prison.*

Be prepared to adjust the plan according to dynamic or changing conditions. Finally, remember that your Contexts of Time, Cost, Scope and Quality must be watched and maintained according to the standards that you have set.



What Comes Next?

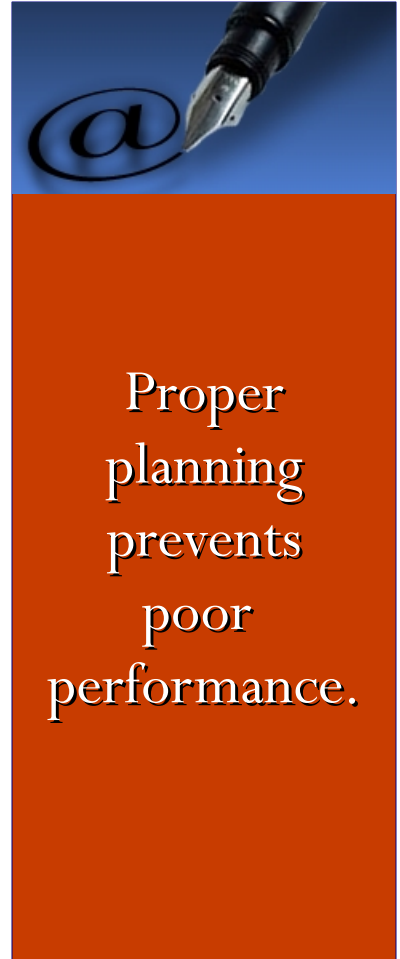
The timeline for the project has been established, the budget is set, and all parties have been informed of their duties.

Now what?

Prepare for how the project is to be concluded, before you begin. Establish the benchmarks that you will be measuring against to create a perspective. You know the “before” situation, you have created a vision of the “after”, now it is time to make your way to the finish line.

Consistently following the five phases of project planning in context will make your next project a success. Now is the time to get started.

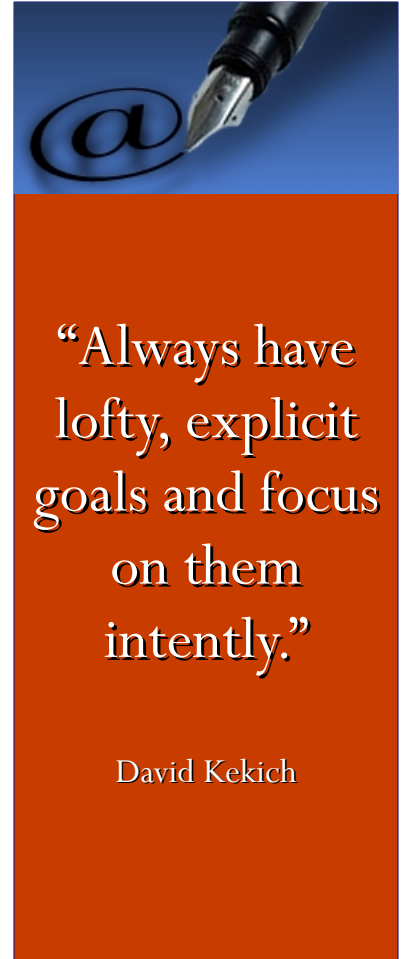
The following pages contain tips and creative thinking exercises to aid you in the discovery process. For more information about project planning and personal productivity, visit www.hdbizblog.com.



Appendix

The following is a basic list of topics to spark your creativity while brainstorming for solutions:

- Experience/Resources
- Executive issues
- Administrative Issues
- Financial Considerations
- Operational Issues
- Quality Control
- Politics - Internal/External
- Legal Issues
- Space/Facilities/Equipment
- Research and Development
- Public Relations
- Risks/Rewards



“Always have
lofty, explicit
goals and focus
on them
intently.”

David Kekich

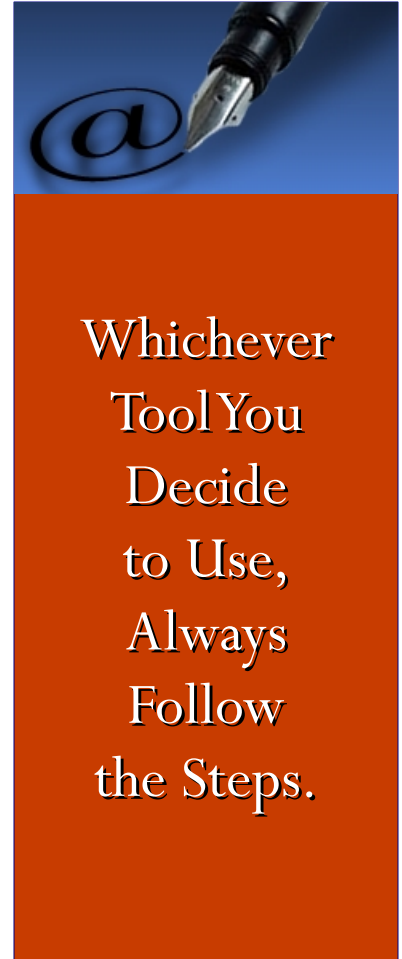
Mind Mapping as a Resource

Here are a few links to some of the mind-mapping resources that are available online:

- **Mind-Mapping.org** [<http://www.mind-mapping.org/>]- a list of over 200 resources!
- **Exploratree** [<http://exploratree.org.uk/>] - web based “thinking guide”
- **Flying Logic** [<http://flyinglogic.com/>] - web based mind-mapping
- **Freemind**
[http://freemind.sourceforge.net/wiki/index.php/Main_Page]
- a free download that you can take with you

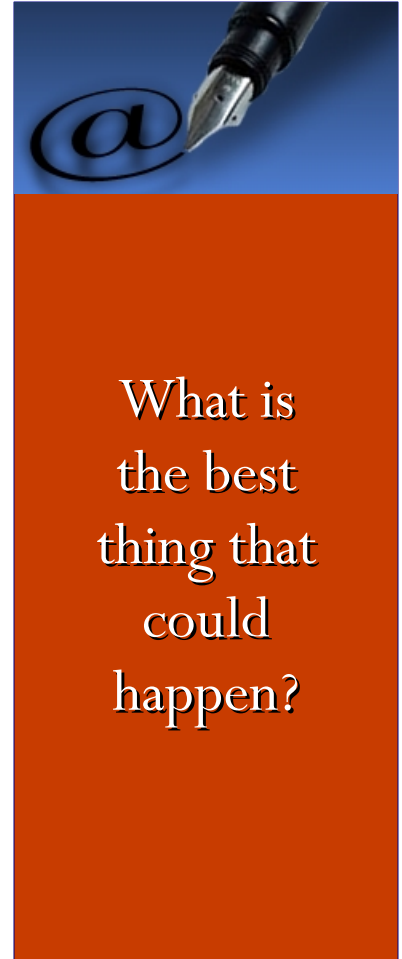
Whatever tool that you use, the basic principles are the same:

- Understand “**Why**”, what is the purpose of the project?
- Visualize the outcome, what is the final result?
- Brainstorm ideas, and capture every one for evaluation.
- Define the Contexts – Time, Cost, Scope and Quality



Creative Thinking Exercises

- Who would have concerns about the success of this project?
- What would they say, ask, or input, that we haven't yet?
- What's the worst idea you can imagine, about doing this project?
- What is its opposite, and therefore the best idea?
- What is the most outrageous thing you can think of, about this project?
- How would a 12-year-old kid relate to this project?
- What would make this project particularly unique?
- What the worst that could happen?
- How could we deal with that?
- What's the best that could happen?
- Are we ready to deal with that?
- How do we feel about this project?



What is
the best
thing that
could
happen?

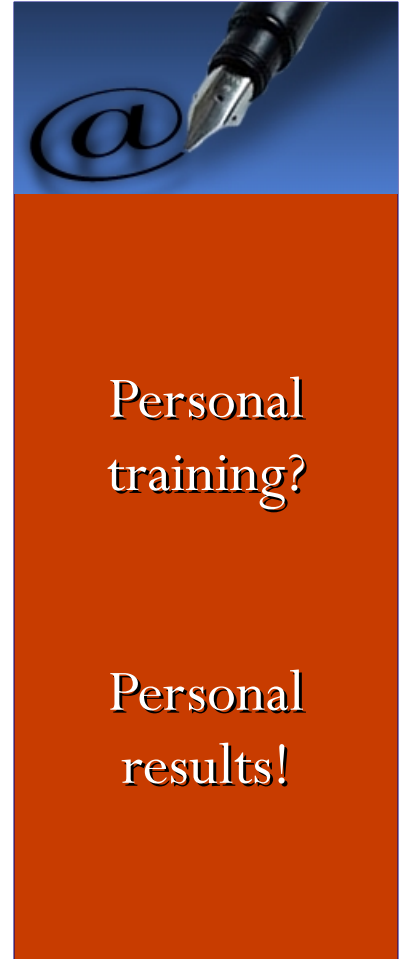
Get More, In-depth Training

To learn more about Project Planning in Context visit the Blog, Productivity in Context, at this link [\[Click this link\]](#).

Project management can be concerned with anything: people, products, services, materials, production, IT and communications, plant and equipment, logistics, staffing and management, finance, administration, purchasing, sales, marketing, human resources, training, culture, customer service and relations, quality, health and safety, legal, technical and scientific, new product development, new business development; and in any combination.

This course will show you the fundamental steps to be followed in planning your small- to medium-sized project. It covers Brainstorming, Affinity Diagrams, Gantt Charts, Critical Path Analysis, and more.

[Click this link](#) to get instant delivery of this important training course.



Personal
training?

Personal
results!