Plan-to-Plan® – PROJECTS!

Introduction

Project Managers have learned to quickly get into the project and to bury themselves in work. Brute human effort is the key to project success. At least, that is the learning by many project managers. This behavior has produced results, recognition, and reward for these project managers. However, it has also produced catastrophic failure. Projects started without planning are subject to failure. They find problems doing, by collision, rather than by seeing, by anticipating. They perform neither contingency planning nor war-gaming for the project. The project team hammers out the project! People like to see measurable progress so they stress starting early. Once they start a project, the opportunity to change the project is lost. The project team becomes firefighters.

Scheduling software provides comfort to executives. There is a plan! The project manager can now plan the work in detail. No one realizes software provides nothing for planning the project strategy, tactics or for the allocation of resources. We can plan the nitty-gritty

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perfectly and miss planning the management, the materials flow, the leadership, and stakeholder relationships. IU'S former coach Bobby Knight has said, "It is not the will to win that counts, rather it is the will to prepare to win that makes winners." How do we change? How do we plan the work and the technology of the work? When do we plan the tools and then the methods? We plan the crew now but where will we plan the teamwork?

Plan-to-Plan® Projects! is the answer to complete planning. Project quality dramatically improves because of the rigorous approach to planning the plan. Project success improves. Higher quality results are produced more rapidly. Effort is not wasted doing work that does not contribute to the result. Project scope is contained because it is well defined – up front. Stakeholders are happier because the project team is attentive to each relationship and committed to exceeding their expectations.

Process

First: The project is flow-charted in general terms. Phases, boundaries, deliverables are defined. The result, scope, and performance are defined. Issue logs are started for assumptions, definitions, information, opportunities, risks, imperatives, decisions, and resolution. As the project process is defined, issues are identified and placed on the appropriate log.

Second: The project process is again walked with planning requirements being identified at the Strategic, Tactical, Operational, Task/Tools (STOTT) levels of impact for each phase of the project. This is a listing of things required to be planned for success at each perspective or level of the project. They literally specify project plans. Project leaders can dive into detail to ensure that tasks or tools do not grow to have strategic impact. Issues continue to be collected and refined.

Third: We then move each element of the project system through the project process to derive planning requirements on STOTT matrices. Issues are still collected, categorized, and refined.

Materials, an element under resources, may have the strategic issue of early ordering; tactical issues of tracking and delivery, operational issues of receipt, storage, protection, and issue; task/technology issues of forms, packaging, scanning, bar coding, and shelving.

Fourth: Together, we develop a plan for the project planning – what, how, who, when, where, with what. The plan addresses planning every element of the Project System.

Fifth: We can extend the process to conduct scenario-gaming using both box and time-line methods. We can also develop project policy, project management processes, and project procedures in this phase.

Deliverables

- Project Process by time line phases.
- Issues by categories.
- Issues specify what needs to be resolved during the planning process.
- Planning requirements by impact.
- Planning requirements specify what needs to be planned at what detail.
- Project plan for planning the project
- Scenario gaming may be used to identify additional issues and planning requirements.
- Project policy, project management processes, project procedures may also be developed here.

Benefits

Every team member:

- Knows the project process for the specific project.
- Knows the issues, why there is an issue, the category of the issue, and why that category.
- Can see the specific project system.
- Understands the planning requirements for every element of the project system.
- Can take different perspectives in planning – Strategic, Tactical, Operational, Task/Tools.
- Can relate how issues evolve as the project progresses.

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2

Operation Definitions

Fundamental Variables

- ♦ Result – What the outcome will do for the user.
- ♦ Scope – The work and its boundaries.
- ♦ Performance – The work itself.

Issues

- ♦ Assumptions – What are not facts that we are treating as facts and how does that impact the project?
- ♦ Definitions – What are the operational definitions for this project?
- ♦ Information
    - ▪ What do we not know?
    - ▪ What do we know and how?
- ♦ Opportunities – What are the opportunities in the project for developing people and the organization? What are the opportunities to significantly improve the success of the project?
- ♦ Threats – What can go wrong? What is the impact? What is the probability?
- ♦ Imperatives – What must we do very well to ensure project success?
- ♦ Decisions – What is needed when? What decisions have already been made?
- ♦ Resolution – What requires detailed analysis and planning using 'box' and 'time slice' techniques?

STOTT – Impact

- ♦ **Strategic** – Impact on the entire project. Duration is months.
- ♦ **Tactical** – Impact on one phase. Duration is weeks.
- ♦ **Operational** – Impact on one activity or operation. Duration is days.
- ♦ **Task/Tools** – Impact on one type of work. Duration is hours or minutes

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3

Plan-to-Plan® Process

Issue Development	Work the Project Process	Planning the Plan	Project Management Processes
Identify issues by Category Assumptions, Definitions, Information, Risks, Opportunities, Decisions Imperatives, Resolution	Planning requirement by STOTT Strategic, Tactical, Operational, Task/Tools	Create a Critical Path to the Plan.	Scenario Gaming Box event or resource. Time slice through system (all aspects of a project at point in time).
First – Lay out the Project Evolution A project develops from Concept to Closure. Use the StickyPath℠ method for laying out the phases of the project over time. **Second** – List the Issues ▸ An issue is anything that has concern, emphasis, or uncertainty associated with it. In many ways, this is a brainstorm to generate as much information about a project as possible. **Third** – Walk the Project ▸ Walk the Work of the Project – this is the execution phase. Go over the physical project. Identify more issues. Walk the project by time. Go over the schedule. Finally, walk the project by technology – the types of work, the tools or equipment of the work, the people or subcontractors of the work. **Fourth** – Categorize the Issues ▸ Sort the issues into Assumptions, Definitions, Information, Risks, Opportunities, Imperatives, Decisions, and Resolution.	**First** – Organize the issues by impact – STOTT (Strategic, Tactical, Operational, Task/Tools) ▸ Label each issue without moving it. **Second** – list the planning requirements under each level of STOTT. ▸ List all the Strategic planning requirements, all the tactical planning requirement, etc. Each higher level can be broken down to lower levels if that is helpful to identifying all the planning requirements. **Third** – Review the project system, project dimensions by STOTT to identify additional planning requirements. ▸ For each element in the system or dimensions, identify any planning requirements by impact – STOTT.	**First** – Go to the Project System and develop an Action Plan for planning each element ▸ Look to the STOTT analysis for guidance. Continue the give-and-take with issues. **Second** – Identify additional Planning Needs ▸ Look for planning needs in the project, for the supporting project process, in project management, project leadership, for the project team, and in the organizational project procedures. **Third** – Plan the Plan. ▸ Create a Critical Path Schedule for the plan. Ensure fulfilling the planning needs is addressed in the schedule. • Use STOTT, a second dimension, to organize issues and to look for more issues. Then move through the project system detail with STOTT to identify more issues	**First**: Identify necessary standing procedures, management processes, project policies. **Second**: Game critical events by box. Revise lists of necessary project management processes. **Third**: Game critical resources by box. Revise lists. **Fourth**: Time-line critical times (kick-off, procurement, field, turnover, commissioning). Revise lists.

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4

The Project System

Input

Project Portfolio
Prospect
Mine
Nuggets
Dust
Tailings

Management
Planning
Organizing
Staffing
Directing
Controlling

Output

Satisfaction
Owner
User
Team
Suppliers
Contractors
Organization

Leadership
Communication
Vision
Values
Ethics
Culture
Recognition
Rewards

Team
Forming
Decisions
Goals
Problem Solving
Conflict
Resolution
Planning
Maintenance
Closing

Controls
Results
Scope
Performance
Risk
Reliability
Relationships
Learning
Time
Cost
Quality

Process
Create the Concept
Define the Results
   and Criteria
Establish the Scope
Plan Requirements
Estimate Effort
Schedule
   Performance
Procure Resources
Execute Activities
Evaluate Results
Close & Celebrate

Resources
Supervision
People
Tools &
   Equipment
Materials
Information
Work Methods
Money
Time

Methods
Options
Selection
Planned Effort
Actual Effort
   Expended
Planned Effort
Estimated Effort
   to Finish
Variances

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