

Project Planning: Preparing a Project Plan

Mika Ahola
mika.ahola@lmf.ericsson.se

Outline

- Project Plan of Project X:
 - 1 Goals
 - 2 Schedule
 - 3 Resources
 - 4 Budget
 - 5 Organization
 - 6 Risks and Opportunities
 - 7 Quality
 - 8 Configuration Management
 - 9 Project Conclusion
 - 10 Other Matters

Project Plan

- The purpose of the project plan is
 - to be foundation for the project work
 - to serve as the basis for the project contract
 - to give all parties involved a common view of the project
- Input:
 - Assignment specification
 - Technical reports
 - Experience database, e.g. project plans and final reports from previous projects
- Output:
 - Project plan approved by project sponsor

Project Definition

- A *project* is named, time-limited and budgeted undertaking for which goals have been established. It is non-recurrent and requires the establishment of a temporary organization.
- OR
- A *project* is a partially ordered set of tasks having functional and temporal dependencies, named resources, effort estimates, and predefined inputs and outputs.

1 Goals

- 1.1 Background Description
 - Put the project in its proper context by describing the current situation
 - Describe the reasons and conditions for performing the project
 - Give a brief summary of market situation
- 1.2 Purpose
 - Define the purpose of the project by describing the effect the project result is to have
- 1.3 Goals and Objectives
 - A *goal* is a result to be achieved in the project

1 Goals

- 1.3 Goals and Objectives (cont'd)
 - Formulate a manageable number of goals and break them down into objectives
 - Ensure that the goals and objectives are SMART
 - Classify goals and objectives as primary and secondary
- 1.4 Included, Excluded
 - Define what is especially included in and excluded from the project
- 1.5 Strategy
 - A *strategy* describes the general course of action adopted to achieve goals
 - E.g. specify processes and tools to be used in the project

2 Schedule

- 2.1 Task Level Schedule

- Refer to a separate task level schedule

Method:

- Project structuring:

For each requirement or feature:

- In accordance with the OBS, determine the parts of organization required to participate the work, and involve them in the next planning steps
- In accordance with the WBS, each part of the organization determines the activities or phase it needs to participate
- In accordance with the PBS, each part of the organization determines the product components it needs to work on
- For each resulting work package, assign a unique identifier

2 Schedule

- 2.1 Task Level Schedule (cont'd)

Method (cont'd):

- Sequencing tasks:

- For each task, define the required inputs and produced outputs
- For each task, connect all outputs to the corresponding inputs of other tasks
- Construct logical network which graphically presents logical dependencies between tasks

- Effort estimation:

- Prepare an effort estimate for each task using a chosen estimation method

2 Schedule

- 2.1 Task Level Schedule (cont'd)

Method (cont'd):

- Resource allocation
 - For each task, evaluate the competence required and compare to the available competence
 - Consider also fitness to the intended team from the team building point of view
 - Select the most suitable person among the available candidates
- Scheduling:
 - Perform critical path method to calculate early and late start/finish dates of the tasks
 - Perform resource leveling according to resource requirements and availabilities to find out scheduled dates

2 Schedule

- 2.2 Milestone Schedule

- Refer to a separate milestone schedule or describe one here
- Specify both milestone dates and definitions

- 2.3 Main Schedule

- Refer to a separate main schedule or describe one here

Method:

- Derive higher level schedules from task level schedules applying project structures (WBS, PBS, OBS)

3 Resources

- Refer to a separate resource plan or describe the resource situation here
- Based on scheduled tasks, present resource requirements and availabilities
- Comment on resource bottlenecks and competence

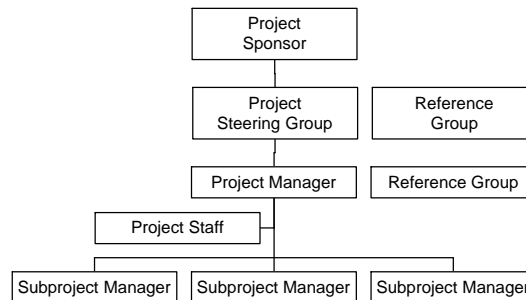
4 Budget

- Refer to a separate budget or describe one here
- Based on effort estimates and schedule, budgeting is performed using bottom-up method
- Present both resource budget and cost budget
- Document both decisions and arguments
- Remember that the budget is followed-up on the same level as planned

5 Organization

● 5.1 Organization Chart

- Present an organization chart or refer to an enclosed one
- For instance:



5 Organization

● 5.2 Connections and Contacts

- Specify the connections between this project and other projects or assignments
- Specify both internal and external contacts by name and function

● 5.3 Roles, Responsibilities and Authorities

- Define the division of responsibility and authority between the project organization and line organization
- Define the members of project management team in terms of roles, responsibility and authority

5 Organization

- 5.4 Reporting and Communication
 - State the principles for reporting in the project:
 - Types of reports
 - Frequency of reporting
 - Specify the meeting structure of the project:
 - Team meeting
 - Project meeting
 - Configuration control board
 - Resource meeting
 - Specify how information is spread within the project and from the project to other target groups:
 - Email, news, web, kickoff/kickout, opportunity for improvement seminar

6 Risks and Opportunities

- Based on the risk analysis, indicate risks and actions to prevent them
- State also opportunities and propose ways of taking advantage of them

7 Quality

- Refer to a separate quality plan or describe the practices to be applied in order to ensure the quality of the project:
 - Reviews
 - Process, product and project management audits
 - Assessments
 - Control of non-conformities

8 Configuration Management

- Refer to a separate configuration management plan or describe configuration management practices:
 - Baseline handling
 - Change control
 - Product and document identification
 - Inspection status
 - Tracing

9 Project Conclusion

- Specify the completion criteria for the project
 - For instance:
 - Product responsibility transferred from the project to line organization
 - Project organization is dissolved
 - Tasks in time reporting system are closed
 - Final report written and approved

10 Other Matters

- Describe any other matter not documented in the previous chapters
 - For instance:
 - Intellectual Property Rights
 - Confidentiality of information
 - Critical computer resources