PLANNING GUIDELINES

Project network and tasks

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High Performance Delivered

Why planning?

- To prevent important activities are forgotten
- To determine the leadtime of the project
- To determine the costs of the project
- Be able to specify the resource requirements
- To make it possible to measure progress
- To be able to assess the impact of delays
- Communication tool for everybody involved in the project

Ensure the goal is achieved!

Without planning?

- Deadline(s) are not met?
- Getting over Budget
- Project members do not have a clear picture of the things to do
- Tasks are forgotten
- Inefficiencies

A planning is not a guarantee for success

The lack of planning is a guarantee for failure

What is a planning?

Gives an initial understanding about what needs to be done:

- An activity plan, which need to be executed in a particular sequence, in order to achieve the goal at a particular delivery date

During the execution:

- Realistic representation of the progress

Provides answers to the following questions:

- What is ready by when
- Who is doing what and when?
- Which resources are required?
- What need to be completed before a next task can be started
- Forecast of the delivery date

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Planning Guidelines

Getting to a Project network and tasks

How to get to a planning

- Determine objective(s), including a due-date
- Determine the possible ways to reach the goal
- Breakdown a complex problem in smaller / known building blocks
- Determine dependencies
- Determine activities and tasks
- Assign resources (roles / named resources)
- Estimate the time required for a task

Project Logic and network

- Start at the end (last task of the project)
- Determine what is required to start the last task
- Work backwards to the start
- When you have identified the first “start” task, walk back to the last task
- Check the overall plan visual – does it look “logical”
- NOTE: only add logical dependencies first. Do not add resources requirements in this stage

Basic rules when identifying tasks

- Give each task a short and clear description
- Tasks should preferably have a lead-time between half a day and 10 days
- Preferably it should be possible to complete the task with only 1 person
- Describe:
  - Input-criteria
  - Activities high-level
  - Describe output-criteria (deliverables)

- Criteria for splitting a task:
  - Is there a handover or transition?
  - Is it possible to manage the task and its outcome end to end

Assign resources

- Plan by role or skill first
- Assign preferably only one person to a task
- Check thoroughly which skill(s) are required for a tasks

Determine Touchtime /Lead-time

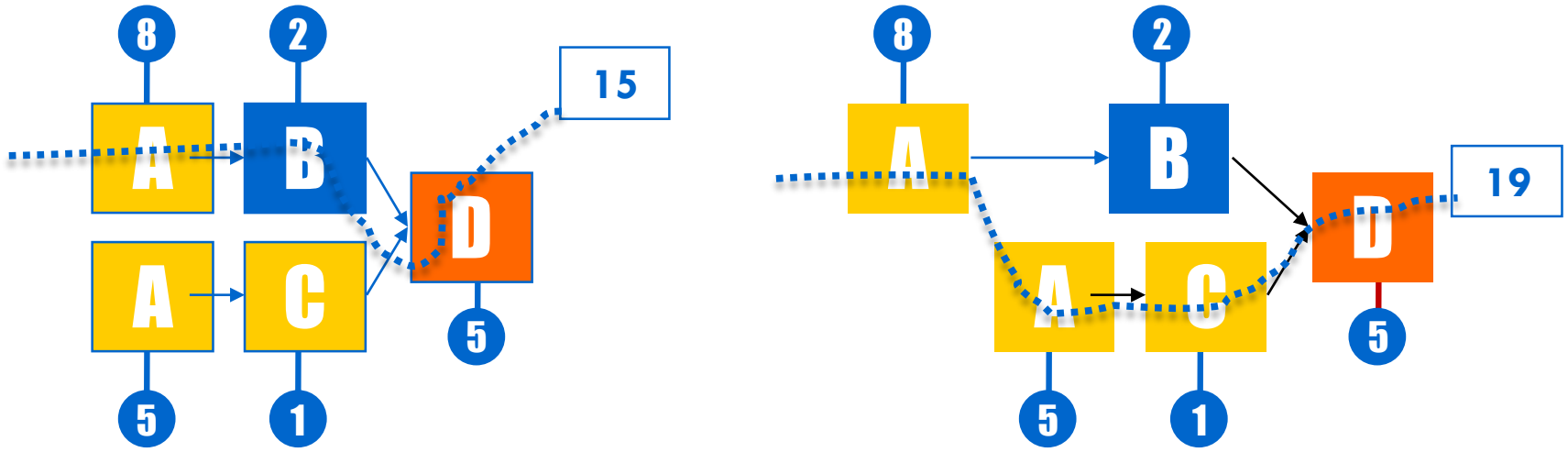
- How to determine touchtime/leadtime?
  - Ask the specialist
  - Ask the resources
  - Using an instrument like FPA
  - Using previous experience
- Always start determining the pure “Touchtime”, and then check if there are other factors that can influence the leadtime
- Leadtime = Touchtime, unless:
  - Multiple resources work on the same task
  - It is not possible to work full-time on a task
- Ask for a pessimistic, realistic and optimistic estimate
- Large differences means probably a risk factor. Check what you can do to contain this potential risk (by adding an extra task or activity?)
- Rule of thumb: tasktime = (O+4*R+P)/6

CCPM Guideline (innovation / product development projects)

*Definition of **Workpackages** with checklist of activities*

- A generic CCPM Guideline from practice:
  - In Critical Chain we say less than 300 tasks/project (in fact we try for less than 100)
  - This means tasks should /can also be configured as “Workpackages” contain several to many actions in a checklist
  - Progress of a workpackage can be done using “Scrum” or Kanban techniques (e.g. LYNX Tame-the-Flow – Card Management)
  - Workpackages can be done by (self-managing) TEAMS (with multiple resources) and also may have a longer duration

Leadtime is determined by the Critical Chain



CRITICAL CHAIN:

Critical Path is not enough!
Also check the available (max.)resources for the project
To identify the Critical Chain

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