## Project level:

* Project name available and understandable
* Set desired end-date (fixed date). Only set a “fixed” start date if you expect can only start in the future
* Decide on starting with planning from left to right (ASAP) or right to left (JIT) via project properties (JIT is considered as the “best practice”)
* ASAP / JIT setting:
  + ASAP setting answers: if I could start today, when can the project be ready
  + JIT setting answers: what is the latest start required to achieve the due date (start “As late as possible, and as early as needed”)
* Switch during planning process between ASAP and JIT, but end with JIT (recommended)

## Task Level 1

* **Task names**: understandable, also if the task is grouped under a parent or “summary task”
* **Task length 1**:
  + The expected lead times are discussed with the specialists (e.g. task managers, teamleads or resource managers)
  + Task have a 1-4 weeks duration typically
* **Skill assignments** to tasks:
  + All tasks have 1 or more skills assigned
  + Always assign the skill group first. Do not assign a task to an individual (named) person.
  + Assign the optimal set of Skills (and intensity – see below), required for fast and optimal task completion
* **Skill Intensity** (unit percentage):
  + When a skill is assigned the default intensity is set at 100 % (unit percentage)
  + Change Intensity:
    - If the required tasks participation of a person is low (for example for “monitoring” or “expert contribution”) set a low(er) intensity. For example 10 %, instead of the default value of 100 %
    - If multiple persons(2 or more) with the same skill are required to work on the tasks assign the skill concerned multiple times (2 or more)
  + in case a skill or all skills are configured as “virtual skill”, see recommendation below 2
* **Dependencies**:
  + Add necessary (technical) dependencies only, avoid superfluous dependencies
  + Do not assign dependencies to summary or parent tasks, but on the first task in the group or last task in the group
* **Task Manager**:
  + Task manager have been assigned to all tasks
* **Add full-kit checklist** (optional):
  + Define checklists with start checks (FullKit at task level) and the definition of done (end-checks), via the “notes” icon
* Other:
* Mark tasks that are already finished as “Completed”, via Task Properties and Task status box at the bottom left of the screen

## Apply CCPM Behavior 3:

* Set the default “shorten task duration” percentage (e.g. 50 %)
* Select the buffers that need to be inserted
* Add / remove buffers and check to overall “shape” of the project and if intended start and due-date are matching

## Final Checks:

* Check open (blue) warning messages next to the task and at the bottom of the screen.
* Review the Critical chain (see filter): consider opportunities for making the critical chain faster, by for example splitting a task or parallelization (a dependency may not be required after all)

## Releasing the Project:

* The process for releasing the project is typically a “portfolio process” involving the PMO or Portfolio manager
* Validate the project with portfolio management

## ***Remarks:***

1. *A general guideline to have not more than 300 tasks/project (in fact we try for less than 100 and a “good enough planning”). Especially if sub-task management (Cards) is implemented, the number of tasks (workpackages) in the schedule typically can stay limited*
2. *Skill Intensity in case of “virtual skills” without resources: in this case the unit percentages may be set to e.g. 200 % (if two FTE’s are expected to work on a task)*
3. *Applying CCPM behavior may be a responsibility of portfolio management (admin user). The responsibility of the Project Manager is to ensure first that a proper and logical plan is entered, with good enough estimates*