Project Plan Review - Checklist

Project level:

☐ **Project name:**

- Available and understandable

☐ **Fixed date:**

- Set desired end-date (fixed date).
- <u>Only</u> set a *fixed* start date if you expect that you can only start in the future

☐ **ASAP/JIT:**

- 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 setting answers:*
    - If you 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*")?
- Advise: 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 the 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) or in case a skill or all skills are configured as "virtual skill", see recommendation[2] below

☐ **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]:

☐ **Shorten task duration:**

- Set default percentage (e.g. 50%);

☐ **Buffers:** select the buffers (and percentage) 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:

☐ **Warning messages:**

- 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:

☐ **Project Management:**

- The process for releasing the project is typically a *portfolio process* involving the PMO or the Portfolio Manager;
- Validate the project with portfolio management.

General remarks:

1. *A guideline is to not have 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*