Getting your project started

This chapter looks at the work required to take a project manager from the situation in which he has a definition of what he is meant to be delivering (the scope), to the position in which he knows how he will do this and has the resources ready to start delivering. Like getting a large boulder to start rolling – planning activity, estimating, resourcing the work and mobilising staff are often the hardest part of a project. Having the idea to get it rolling was not difficult, keeping it rolling is not always so tough, but overcoming initial inertia can be very difficult.

A lot of good planning and resourcing has less to do with the art of being a project manager, and more to do with a real understanding of project management mechanics and tools. I make no claim that this is a particularly exhaustive or complete study of these topics. This section overviews the principles and provides some context for the rest of the book. It includes many tips I find useful to remember. For the person who is not an expert in project mechanics this will add value. The real benefit of this chapter is to give you a framework to help you think and test whether the way you are approaching planning and resourcing is sound. In addition, it looks at the reality of doing this in a live environment and the difference between the theoretical situations in which you may learn project management, and the real-life experience of setting up a project.

In terms of what you have learnt so far, implementing the knowledge in this chapter in practice will depend on the clarity and completeness of the scope you have defined, your continuing ability to communicate, critically your good judgement, and to some extent your creativity. The

other point to hold in mind is that every project is unique. Use your plans and resources from prior projects to help your thinking, but adapt them to the specific situation you are now managing.

Key lesson

The way you plan and resource your project will set the framework and constraints within which you will operate through the project. Take the time and make the effort to do it properly.

Planning

The first skill that new project managers learn, and the activity that non-project managers most closely associate with project management, is planning. Planning is fundamental. Without a plan, thinking or saying that you are on time, late or early, on budget, over or under budget is meaningless. To scale its criticality I know of some very successful project managers who can spend up to 30% of their time scoping and planning a project.

❝ simply entering data into a project planning tool will never deliver a good plan ❞

I think it is important from the outset that you differentiate between planning and planning tools such as Microsoft Project. It is like the difference between writing and a word processor. The software is extremely useful and you would be foolish not to make use of its powerful facilities, but simply entering data into a project planning tool will never deliver a good plan. Good planning requires you to use your brain.

Before you start planning you must ask yourself what you are planning for. If you cannot answer this question it is likely that the plan you develop will not be particularly useful. There are typically three possible answers to this question:

1 You are developing a plan because you need to form a view of what tasks there are in a project and thus how long it will take, and from this be able to derive what resources will be required. This is the plan as the project manager's core work.

2 You are developing a plan to explain to senior managers and other stakeholders how a project will be delivered. This may be to get approval and support for your plan, or simply to explain status and

issues to people who need to know. This is the plan as an external communications vehicle.

3 Finally, you may develop a plan to enable people involved in the project to be allocated to work and for them to understand how their work fits within the project. Understand that a project plan is as much about ensuring that people are allocated to the right tasks as it is about looking at timings. This is the plan as a work management and internal communications vehicle.

The reality is that at some stage in most projects you need a plan to be able to do all three of these things. These three tasks should be inter-related and the plan that is used in each case should be derived from the same base information. But do not assume it is the same representation of the plan in every case. As a project manager you must be able to alter the level and scope of detail and the style of presentation in each of these situations, and potentially in different variations of these situations. A senior management presentation will typically want to see a high-level milestone chart, an individual working on the project will want to see the activity breakdown relevant to them, and you as the project manager will need various views depending on the task you are undertaking. Every time you present a plan, therefore, you must be clear about:

■ The level of detail required in this situation.

■ The presentation format. (For example, a work breakdown structure, Gantt chart and network diagram communicate different things to different audiences. Network diagrams are a very powerful project management tool but are of limited value as a senior management communication vehicle. Milestone charts are great for those interested in the outcome of the project rather than the details of how it will be done.)

■ The degree of 'specificity'. For example, is it generic about resources and resource type, or is it specific and names a particular individual?

The process of planning is in theory not desperately complex, though in practice it can be both intellectually and physically(!) demanding. Good planning starts with a full understanding of scope. Although you should start thinking about planning while developing the scope, 'planning in anger' cannot start until the scope is clear and understood. The basic process is:

■ Build a work breakdown structure – there are many formal definitions of this term. In this context I mean simply to break the overall project

into its component tasks, and then iteratively decompose these tasks into lower levels of detail until the plan is detailed enough to manage.

■ Identify and build in the dependencies between the tasks.

■ Add the lengths of time each task will take – this is where estimating skills come into play.

■ Determine the resource types and quantities you need to meet this plan.

■ Add in your actual resource availability – in some cases this will lengthen tasks, in some cases it may shorten them. Once you have done this you have a complete first-cut plan. You may need to iterate this step several times, refining the plan as a result of actual resource availability before you produce your baseline plan. This is shown in Figure 5.1.

■ Add appropriate levels of contingency.

In implementing this process there is a complex set of more detailed and difficult considerations to layer on top. How much you need to go into these will really depend on the scale, scope and complexity of the project you are managing. In my perspective the most important considerations are listed below. Each one of these is the subject of many millions of words of documented debate and opinion. For some project managers it is essential to build up in-depth capabilities in these. In my general experience, on the average project, understanding the top-level basics and applying common sense to the situation you are in is quite sufficient.

■ **Who helps you develop the plan?** In a project of any complexity you will not have the knowledge or skills to develop all the plans. You may not have the specialist skills to understand the work breakdown for some tasks, and you will not be able to estimate the task durations. You will need to call on others' expertise to input into the process. However, whoever is involved it is still your plan, you must integrate the components and you are fully accountable for the end result.

■ **Milestones**. A plan is a list of tasks and you can, as project manager, track and report on every single one. More constructively it is helpful to break the project into a series of stages, the completion of each stage being marked by a milestone. These stages may overlap or may be purely sequential. The aim of a milestone is to have points on the plan that enable a *visible, measurable* and *communicable* show of progress. For example, in developing a new product, saying to someone that you have determined the colour is typically not useful