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WHITE PAPER

The Art of Project Planning

The devil is **not necessarily** in the details

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The Art of Project Planning

The devil is **not necessarily** in the details

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Abstract

At the heart of every project lies a plan that drives the activities that result in the final outcome of the intended project or product initially envisioned by the customer. In the project management world, the customer (internal or external) is king. Delivering on what was planned in a timely manner, then, makes the difference between a good customer experience and one that can go awry. However, the tricky thing about any project plan is that it is the project stakeholders involved who help define the level of complexity and the direction of its structure. Thus, it is up to the project manager responsible for building the plan to manage customer expectations while identifying the needs of team members so that deliverables can be efficiently managed and met.

Developing the perfect project plan requires the skill set to truly gauge your team members' needs while satisfying the final customer. Depending on the type of project, varying levels of detail are required in the construction of a plan. In projects that require careful guidance of team members along a specific path, a more detailed plan makes more sense. Conversely, with highly independent project teams, a less detailed plan is more appropriate. As planning goes, it is best to keep the level of detail to the minimum. Team members have just enough information to effectively execute on tasks while a project manager's ability to efficiently manage and control the plan is optimized.

This white paper will provide organizations with common strategies project managers leverage to develop effective project plans that please both team members and stakeholders who are ultimately responsible for the successful execution and outcome of the activities detailed by the project manager.

The role of the plan

In order to successfully build a plan, the first step is to understand the role of the plan in the context of the project as a whole. For many project managers, the plan and the project are one and the same. The approach is to build a plan, and if executed on time and within budget, project success will ensue. This overly simplistic approach leaves open many possible avenues of failure. Although the plan should be the heart of the project, project managers must not forget that the "heart" still needs all other vital organs and body parts in order to be a fully functioning project. The heart pumps life into them. In other words, a plan's success is equally dependent on the resources, stakeholders, charter and documentation, and all other project factors that must work harmoniously toward the success of a project.

In light of this, the plan must be treated as the primary document on the execution, management and control of all activities based on the equal input of stakeholder needs, available resources and overall project vision. A successful plan is built on all pieces that make up the project and not the other way around in which many build a plan to drive the needs and vision of the project. In fact, best practices in effective project planning demand continuous review and adjustments to the plan to reflect the true direction of the total project.

Common pitfalls and tips in project planning

Developing a project plan can be a daunting task. Putting together a well-crafted document that includes all necessary activities, milestones, assignments and details can take significant effort and, in many cases, presents the planner with obstacles preventing smooth plan development. In order to mitigate the difficulties of project planning, project managers can incorporate certain basic strategies to optimize their efforts.

Here are some of the common pitfalls and solutions to facilitate the quick and successful development of projects plans:

1) Don't bite off more than you can chew.

Plans do not need to be fully developed before they are put into action. The reality is that the project plan as a living document will be adjusted with the ebb and flow of the project. Use Pareto's 80/20 rule to get the ball rolling. Then let your team and stakeholders guide the document as needed.

2) No need to start from scratch.

Reinventing the wheel will not necessarily make for a better plan. In fact, too much time is often wasted on building a plan that undergoes a number of changes down the line. Leveraging existing project templates and best practices is an excellent way to reduce the initial effort in project planning.

3) Avoid analysis paralysis.

An over-detailed plan, in many cases, results in an ineffective execution on granular activities and causes problems in the tracking progress. Finding that right balance of detail in the plan allows team members to have a better understanding in their execution while delivering the necessary project data for stakeholder decisions.

4) Don't build the plan alone.

One of the most critical steps in successful project planning is including stakeholder buy-in and involvement in the development process. The plan needs to be the roadmap of the entire project and all parties are responsible for its success. Working in a vacuum and building a plan based on assumptions is dangerous. The plan will always be imperfect and evolving. For this reason alone, stakeholder involvement is needed to help guide and approve the project plan despite the final results.

Although pitfalls are unavoidable in the planning development process, the project manager's role does not change. The project manager must develop a plan that will reflect the best version of the truth of the evolving project. This being the case, planners must recognize that they should not be left alone to their own devices and must involve as many relevant parties as possible to build a plan that will have the best chance to succeed.

Working with the plan

Once the well-crafted document presented as the "Project Plan" is ready to be put into action, the next step is to effectively share the relevant pieces of the plan in the best possible manner to the different team members and stakeholders responsible for successful execution. How this information is shared, and to whom, will make the difference between a poorly executed plan and a plan that exceeds expectations. To best determine the different methods for delivering planning details, there needs to be a mapping of the various resources that will interact with the plan. This mapping includes the most appropriate mode of delivery of those details. The goal of this mapping exercise is to streamline and optimize the plan execution.

There are typically three types of "users" who need to interact with the plan:

- 1) Project planner(s)** - this user type is typically the project manager (assigner) responsible for building the plan and, in larger projects, can include schedulers who assist in plan development and task assignment.
- 2) Project workers** - these users make up all the team members (assignees) responsible for delivering/executing plan activities and milestones.
- 3) Project stakeholders** - this group comprises all the decision makers, including executives and sponsors, who need to track and analyze planning details to ensure the project is on the right path and to drive change (if and when needed).

Since each of these user types have different needs, the right tools and information must be selected based on the different user profiles. To facilitate this process, project managers should consider the following table as a guide to provide the best exposure of the information derived from their project plans:

User Type	Planning Details Needed	Delivery Tools
Project planners	Tracking and scheduling of: <ul style="list-style-type: none"> • Milestones • Activities • Dependencies • Multiple baselines • Critical path • Assignments • Timelines 	Tools include: <ul style="list-style-type: none"> • Work Breakdown Structure (WBS) view • Gantt Charts • Documents • Dashboards and reports
Project workers	Tracking and updating of: <ul style="list-style-type: none"> • My work • Issues • Tasks • Assignments • To-dos • Documents 	Tools include: <ul style="list-style-type: none"> • My work view • Task list view • Time sheet view • Kanban view of work
Project stakeholders	Tracking and sharing of: <ul style="list-style-type: none"> • Project and plan progress and status • Planned vs. actual of workload and costs • Risks, issues and changes 	Tools include: <ul style="list-style-type: none"> • Multi-project and portfolio dashboards and views • Traffic light indicator views • Multi-project Gantt views • Workload and cost reporting and charts

Carefully evaluating your project resources and implementing a strategy to serve their specific needs will not only improve a plan's success rate, but also will allow a plan to be quickly adjusted as critical changes arise.

Genius Project Planning & Gantt Chart

Powerful interactive Gantt chart

Gantt charts are a commodity that every project management solution needs to provide. Genius Project is project management software that offers its own web-based Gantt charting tool, Genius Planner, which includes a tight integration with Microsoft Project. Along with Genius Planner, users, regardless of position, will also have a variety of tools to access, track, share and update project plans.

Project planning and Gantt chart software include the following highlights and benefits:

- Enhanced Project Charter
- Powerful Gantt chart
- Easy resource and team scheduling
- Multi-project Gantt chart
- What-if scenario
- MS Project two-way integration
- Manage cross-project resource usage and allocation conflicts
- Streamline planning processes and task-list distribution

To learn more about Genius Project's planning capabilities, go to - <http://www.geniusproject.com/planning-gantt-chart-software>