PROJECT MANAGEMENT

PROJECT TEAM PLANNING & PROJECT START UP

NEED FOR COLLABORATIVE PROJECT TEAM PLANNING

Recognition of the need for project team planning has grown out of the increased awareness of: -

- ✓ *Weakness in the more traditional project-planning approaches*
- ✓ *Difficulties in getting functional managers and team members to be committed to a plan that has been created by others.*
- ✓ *Need to accelerate the project-planning and team building processes at the very beginning of a project, or at the beginning of new phase of a project.*

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Team planning can also be used effectively when any major change in scope is required or when a major, unforeseen problem is encountered

TRADITIONAL PROJECT-PLANNING APPROCHES

• *Smaller projects/organization* – PM put together whatever plans and schedules for the project.

• *Larger organization* – project planning specialists (planner, schedulers, cost engineer & etc) create the project plans, schedules and budgets.

Carry out work for specific project under the direction of the PM.

Weakness in the Traditional Approaches

• Project plans, schedules and budgets do not reflect the realities of how the work will actually be done – many ways to plan and execute a project.

• The functional managers and other team members, and even at time the project manager, are not committed to the plans and schedules.

• More than one plan exists – PM not committed to the official plan produced by a central planning department, produce real plan as a result.

• The planning process is inefficient in the use of key person's time – PM / planning specialist meet with each individual team members one-on-one to obtain the needed information.

- This round robin process is inefficient and consumes much time and slow down the critical start up period of the project.

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Weakness in the Traditional Approaches

• **Plans created either without any involvement of key people, or with their involvement through "round robin" approach, will generally be based on a bottom-up view of the project – results project plans and schedules often poorly integrated.**

• **Standardized project templates are used improperly – using overall project templates contradicts the definition of a project (project is unique)**

Project Start-up Workshops and The Project Team Planning Process

✓ **Organization regularly hold project kick-off meetings to inform key participants that a particular project is being launched (contract received / project proposal approved).**

✓ **The fundamental of systematic project start-up workshop is project team planning.**

✓ **Start-up workshops provide the setting and well-planned process that enable the project team to work together effectively to produce integrated plan and schedules in a very short period.**

✓ **Project start-up not only to the very first start up (beginning of conceptual phase of the project) but also the beginning of each subsequent phase : definition, proposal, execution and project closeout.**

The Team Planning Process

- ❑ *Adequate preparation*
- ❑ *Identification of the key project team members*
- ❑ *Interactive exchange of information*
- ❑ *Physical setting conducive to the process*
- ❑ *Capturing the team memory*
- ❑ *Appropriate planning aids*
- ❑ *Use of a planning process facilitator*

1. Adequate preparation

- ✓ *Defining the specific objectives of the team sessions and the results to be achieved.*
- ✓ *Establishing a well-planned agenda for each session.*
- ✓ *Preparing sufficient project planning information in preliminary form (project objectives, scope definition, PBS/WBS)*
- ✓ *Setting the session date sufficiently in advance to ensure that all team members can attend*
- ✓ *Announcing the session through appropriate authoritative channel to ensure higher management interest and support and to assure that all team members show up.*
- ✓ *Defining and understanding the planning process to be used and the roles and responsibilities of the project manager and the planning process facilitator.*
- ✓ *Arranging for a suitable meeting facility and related logistical support.*

Identification of the key project team members

❑ **Each of important functional specialties contributing to the project must be presented. This may include people from within and outside of the organization (contractors, consultants, major vendor, etc.)**

❑ **The persons holding responsibility and accountability for the project within each functional area (the functional project leader)**

❑ **If a functional project leader cannot make commitments of resources for his function, that person's manager (who can make such commitments) should also be invited to participate in the team planning session.**

❑ **If the key team members number more than 20 people, special efforts are needed to assure appropriate interaction (breaking into smaller working team sessions)**

❑ **The project manager plays a vital role in the team planning sessions, but not dominate the sessions.**

Interactive exchange of information

✓ **Collaborative project team planning concept is the need for intensive interaction between the team members during the planning process**

✓ **The session preparation, the information provided, the physical setting and the methods of conducting the planning sessions must be designed to promote this interaction.**

✓ **Immediate recording of keyword abstracts of what is said (recall trigger).**

✓ **Immediate display of the group memory.**

✓ **Exploration of what the group memory means (through interactive discussion)**

✓ **Continuing the process until the objectives of the session have been reached.**

Physical setting conducive to the process

✓ **Plenty of wall space with good lighting for display of the team memory and planning result.**

✓ **Open access to the walls by the team members (elimination of large tables and other and other impediments to individual movement and interaction)**

✓ **Sufficient space to enhance individual comfort and open communication.**

Physical setting conducive to the process

• **Using key cards as "memory hooks" to recall specific ideas.**

• **Creating a visual record on the walls of the planning theater or meeting room.**

• **Proper information structures that are appropriate to the planning work being done : models, drawings, symbols and charts.**

Appropriate planning aids

✓ **Notebook computers and digital projectors to enable interactive team planning by join viewing of all information, capture of the team memory, and instant analysis of proposed plans.**

✓ **Preformatted output files in Power Point, Excel or spreadsheet software, MS Project or other scheduling software for – PBS/WBS responsibility matrix, contact/team members list, agendas and minutes.**

✓ **Portable color printers to produce usable hard copies for all team members during the planning sessions.**

✓ **Whiteboards, marker pens, plastic coated, adhesive paper for wall planning work .**

Use of a planning process facilitator

✓ **Supports and enables the process of interactive communication.**

✓ **Is skilled in information capture, structuring and analysis.**

✓ **Is expert in the application of project planning, control methods and technique of project management.**

✓ **Lead the team during the planning sessions in the processes of exploring, identifying, evaluating, decision making and planning.**

✓ **Maintains the process disciplines to the established agenda for the planning session.**

Project Manager's Role in Team Planning

✓A key characteristic of the PM's role in planning is *integration*.

✓ PM must assist project team members in developing acceptable plans and schedules that achieve the objectives of the project and reflects the plan and available resources of the various team members .

✓ Establish his leadership position.

✓ Create the management paradigm **(overall model)** that project team will use on the project.

✓ Establish the proper focus of the project team.

✓ Make the project "special" among the contributing functional managers.

Satisfying the need with project start-up workshop

1. Workshop Objectives

✓ **To apply proven project management methods to the project and develop as a team jointly agreed-upon project plans, schedules and control procedures.**

✓ **To assure good understanding of the roles and responsibilities of customer project team members, thereby enhancing effective teamwork. .**

✓ **To identify additional steps needed to assure project success.**

Satisfying the need with project start-up workshop

1. Start-up workshop planning deliverables

✓Agreed list of key project team members.

✓ List of key concerns and major open issues.

✓ A well-defined project / work breakdown structure (PBS / WBS).

✓ A task / responsible matrix based on the PBS / WBS.

✓ A list of key project interface events, linked to the PBS / WBS and showing the initiator and receiver (s).

✓ A project master schedule, based on PBS / WBS, reflecting the key project interface events and based on the consensus of the project team on the overall allocation of time.

✓ Agreed procedures for project monitoring and control, including date for periodic project review meetings.

✓ A mutually agreed upon escalation plan that takes into account how key problems or conflicts will be escalated through organizational channels for prompt resolution.

✓ Action items resulting from the start-up workshop discussion, with assigned responsibility and agreed upon due date for each.

Results Achieved

✓ **Better project and functional planning.**

✓ **Improved financial performance.**

✓ **Better communications and teamwork.**

✓ **Improved customer relations.**

✓ **Benefits to the Project Manager**

      ~ **positioning the project manager**

      ~ **detailed planning and scheduling**

      ~ **project manager as project interface manager**

      ~ **earlier establishment of the project manager as the leader of the project**

Hidden Agenda Items within the Start-Up Workshop Process

✓ Introducing uniform, proven industry project management practices with common terminology.

✓ Providing hands-on training to all project team members in effective project planning and control methods.

✓ Tapping the wisdom of the group to develop the best overall project plan.

✓ Creating a shared vision of the total scope of the projects, its challenges, and its objectives at several levels.

✓ Demonstrating and gaining the power and benefits of open team planning and communications.

✓ Establishing early project discipline and the management model for the project.

✓ Exchanging experience and developing planning skills and understanding among the team members of all aspects of what goes into a complex communication / information systems project.

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Modifications Made for Smaller Projects

✓ **Reduce the duration of the internal sessions from two days to approximately four hours.**

✓ **Condense the formal presentations to fit the reduced time.**

✓ **Prepare more detailed draft of the project breakdown structure, the task / responsible matrix , the interface event lists and the project master schedule before the workshop is started and incorporate any changes introduced by team members during the workshop sessions.**

✓ **Shorten the client workshop to four hours or less.**

✓ **Address only areas of relatively high risk.**

Benefits of
Project Team Planning

✓ Plans produced are based on how the work will actually be accomplished.

✓ Person responsible for performing the work have a greater sense of commitment to the plans and to the project.

✓ Only one set of plans exist: those that the project team has created and is following.

✓ The overall time required for planning by the key project team members is reduced.

✓ The project plans reflects a top-down approach using the total wisdom of the project team, which then sets the stage for more effective, detailed, bottom-up validation and elaboration of the plans.

✓ The project managers gets an early indication of where to spend his or her time to begin mitigating the risks of the project.

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Limitations of Project Team Planning

It would not be appropriate to insist on the type of team planning described if projects: -

✓ **Are of type that is very known to the organization.**

✓ **Are very repetitive of many previous projects.**

✓ **Have project team members who are all experience in this type of project.**

✓ **Have planner available who can produce plans and schedules that are valid and acceptable to all concerned.**

✓ **Satisfy top management with their financial and technical results.**