

# Project Planning 1

## - Pre-Module Reading

### Project Specification

Completing this provides a rough brief for the project and what it will achieve. It is an opportunity to think through and summarise the main issues, before you plan in detail. It also provides you with a document to help your stakeholders and colleagues understand your project.

**Title**

Write here the title that you will use to refer to the project. Make this detailed so it can't be confused with another project. Be sure to include the proposed end-date.

**General Aims**

Write here the broad rationale and intentions behind the project, i.e., what are the main reasons for doing this?

**Scope**

This is a list of what the project will cover – and where needed, what it does not cover. In effect, it 'boxes off' the project. Describe the size and extent of the project, e.g., does the project affect one section, a whole department or the whole of the organisation? Does it stand-alone, or is part of a larger piece of work? Will it solve a whole problem, or just part of it?

**Objectives and Results**

These are the end goals you want your project to achieve. Include here your success factors – time, quality, cost and/or quantity for example.

**Deliverables**

What will be seen/felt/heard from the project? A deliverable can be software, a design document, a training programme or milestone that is required by the project plan. Milestones are key points in the project. For example, obtaining approval from someone, testing something, sending something out to a customer and so on.

**Assumptions and Dependencies**

Identify any links between the project and other work or external factors. For example, does your project depend on the outputs and outcomes of other projects? Are other projects dependent on it?

**Stakeholders**

These are the people involved in or affected by the project, and whose support and commitment you will need to secure. Some stakeholders may have the power to intervene in your project, so it's particularly important to know who your stakeholders are, and what their stake is in the project.

**Risks**

These are problems that may interfere with your project. It's important to think in advance about what might go wrong and how you can mitigate this.

## Task Analysis

This helps you to identify all the tasks you will need to complete during the course of the project. The idea is to analyse the work to a realistic level of detail, so you can see the full extent of the work involved. To do your analysis you need to:

- Brainstorm all the tasks.
- Estimate the actual time needed for each.
- Estimate the timescale over which each task could be completed.
- Sort them into categories.
- Write them into your Task Analysis document.

### Task Brainstorm

The simplest way to do this is with post-it notes. Write every task that is needed down on a post-it, one task per post-it. Don't try to do this in any particular order, just note down each idea as it comes to you. Some tasks may be large and will need breaking down further.

When you have completed your task brainstorm, add a timescale to each post-it. Then group those tasks that are similar or need to be done together.

### Timescale versus Actual Time

Timescale is not necessarily the same as actual time required. For example, a task may need two days of someone's time – that's 14 hours if they work a 7-hour working day. But he/she may only be able to allocate 2 hours per day to the task, so the timescale for the task would be 7 working days.

Timescale can be predicted far more easily than actual time required and is the more important of the two, because it has the most implications when it comes to actually scheduling the tasks to be done. In real life you may need to talk to the people involved in the different tasks to understand the timescale and actual time each will need.

If timings are wrong, this has a knock-on effect on all subsequent deadlines. We would strongly suggest that you add contingency times, i.e., additional periods to allow for any overrun. This is useful in setting minimum and maximum overall timescales - the actual time will probably fall somewhere between these two extremes.

The example on the next page is an excerpt from the Task Analysis for a project to review and update Health & Safety procedures.

## Task Analysis Example

| Stage    | Activity/Task                                                                                                            | Timescale      | Actual Time      |
|----------|--------------------------------------------------------------------------------------------------------------------------|----------------|------------------|
| <b>1</b> | <b>Review and update H&amp;S procedures.</b>                                                                             | <b>44 days</b> | <b>19.5 days</b> |
| 1.1      | Research current legislative requirements for our industry.                                                              | 2 days         | 0.5 days         |
| 1.2      | Data collection: Questionnaire design and testing.                                                                       | 10 days        | 5 days           |
| 1.3      | Data collection: Questionnaire distribution to every department to establish current awareness levels/working practices. | 1 day          | 1 day            |
| 1.4      | Data collection: Questionnaire analysis and report.                                                                      | 5 days         | 2 days           |
| 1.5      | Consultation on findings and recommendations.                                                                            | 14 days        | 7 days           |
| 1.6      | Update policy/procedures as agreed.                                                                                      | 5 days         | 2 days           |
| 1.7      | Write new H&S Guidance Notes for managers.                                                                               | 3 days         | 1 day            |
| 1.8      | Write new H&S training module.                                                                                           | 4 days         | 1 day            |
|          | <b>Contingency time (+ approximately 10%).</b>                                                                           | <b>4 days</b>  | <b>2 days</b>    |

## Project Schedule

This helps you to map out exactly what will need to happen and when. The timings in your Task Analysis provide the starting point for your Project Schedule.

Some tasks won't be able to start until others have been completed. Others may overlap, or will be able to run consecutively.

The example below comes from the Task Analysis example on the previous page:

Task 1.1 (research current legislative requirements) can be done at the same time as 1.2, 1.3 and 1.4 (Data collection). But these all clearly need to precede 1.5 (Consultation on the findings). All these tasks have to be completed before 1.6 (Updating policies/procedures).

Finally, Task 1.6 must be completed before moving on to 1.7 and 1.8 (Writing guidance notes and induction training materials). The last two, however, can run simultaneously, provided different people do them.

The overall timescale for completion of all the tasks is 44 days. In our example, we have been given a completion deadline of 13<sup>th</sup> July so we have mapped backwards from here and realised we have to start the project on 1<sup>st</sup> June (at the latest) to meet this. It's always a good plan to work back from your deadline.

We have mapped the tasks and the times allocated to them from the Task Analysis on the Project Schedule by shading in the time needed. We've then included the contingency time, which we've put at the end, so the deadlines for earlier tasks can be rolled forward a few days if needed. Contingency time can be put between tasks or at the end, and it can be broken into smaller chunks. The key is to use it wherever it seems most sensible to you, which usually means where you think there is a likelihood of someone missing a deadline.

Once the Project Schedule is complete, you have a very clear way of seeing which tasks will be held up if a deadline is missed. It's a useful document to give to everyone involved in the project, so that they can see immediately what they must provide by the deadline or else disrupt the whole project. However, if you are going to do this, don't include the contingency time or you might find that everyone adds this to their own time plan.

## Project Schedule Example

| Project Stage 1                                                                                                              | June |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    | July |   |   |   |   |   |   |   |   |    |    |    |    |  |  |  |  |
|------------------------------------------------------------------------------------------------------------------------------|------|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|------|---|---|---|---|---|---|---|---|----|----|----|----|--|--|--|--|
|                                                                                                                              | 1    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 1    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 |  |  |  |  |
| 1.1 Research current legislative requirements for our industry.                                                              |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |      |   |   |   |   |   |   |   |   |    |    |    |    |  |  |  |  |
| 1.2 Data collection: Questionnaire design and testing.                                                                       |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |      |   |   |   |   |   |   |   |   |    |    |    |    |  |  |  |  |
| 1.3 Data collection: Questionnaire distribution to every department to establish current awareness levels/working practices. |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |      |   |   |   |   |   |   |   |   |    |    |    |    |  |  |  |  |
| 1.4 Data collection: Questionnaire analysis and report.                                                                      |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |      |   |   |   |   |   |   |   |   |    |    |    |    |  |  |  |  |
| 1.5 Consultation on findings and recommendations.                                                                            |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |      |   |   |   |   |   |   |   |   |    |    |    |    |  |  |  |  |
| 1.6 Update policy/procedures as agreed.                                                                                      |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |      |   |   |   |   |   |   |   |   |    |    |    |    |  |  |  |  |
| 1.7 Write new H&S guidance notes for managers.                                                                               |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |      |   |   |   |   |   |   |   |   |    |    |    |    |  |  |  |  |
| 1.8 Write new H&S training module.                                                                                           |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |      |   |   |   |   |   |   |   |   |    |    |    |    |  |  |  |  |
| Contingency time (+ approx. 10%).                                                                                            |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |      |   |   |   |   |   |   |   |   |    |    |    |    |  |  |  |  |

N.B. In this example we have shown every day in June and July, up to the deadline, for the project example. For your own project you should allocate actual dates. It may well be more sensible for you to use larger blocks of time, such as weeks. When you do this in the workplace you could easily do this on a spreadsheet.

## Resource Plan

This helps you to identify what and whom you will need, and when in the project you will need them.

### **Skills/Knowledge**

List here any specialist skills or knowledge that will be needed to carry out particular tasks in the project. Link these clearly to the task for which they will be needed.

### **People**

List here the people who will be primarily involved in the tasks. These might include key stakeholders (people who need to be informed/consulted) and/or specialist experts (people whose expertise is necessary to perform the task).

### **Materials/Equipment**

List here any special materials or equipment that will be needed to carry out the task. In general, you would not include items that are 'standard equipment' and already available - computers for example.

### **Facilities**

List here any additional, non-standard facilities you might need. These might include meetings rooms, presentation equipment, allocated space on internal networks, etc.

## **Project Administration**

The Resource Plan is particularly useful if you want to delegate the general administration of your project. The Administrator could, for example, check against the Project Schedule to see when meetings rooms and presentation equipment etc. are needed, and make the necessary arrangements.

## **Project Communication**

You can also use the Resource Plan to start identifying when and how you might need to communicate with others. For example, setting up focus groups, reporting to senior management and so on.

## **Expertise**

The Resource Plan will also help you to identify where and for what you might need to bring in external support. For example, advice on Health & Safety issues.

The example below comes from the Task Analysis and Project Schedule in the previous pages of this document.

## Resource Plan Example

| Stage | Skills/<br>Knowledge                    | People                                      | Materials/<br>Equipment | Facilities                                    |
|-------|-----------------------------------------|---------------------------------------------|-------------------------|-----------------------------------------------|
| 1.1   | H&S Knowledge.                          | H&S Consultant.                             |                         |                                               |
| 1.2   | Questionnaire design.                   | Office Services focus group.                | Survey software.        | Intranet access.                              |
| 1.3   | None.                                   | Project Administrator.                      | None.                   | None.                                         |
| 1.4   | Questionnaire analysis. Report writing. | Spreadsheet expert.                         | Survey Software.        |                                               |
| 1.5   | Running focus groups.                   | Representative sample from each department. |                         | Large conference room.<br><br>Data projector. |
| 1.6   | Writing.                                | HR.                                         |                         |                                               |
| 1.7   | Writing.                                | Technical writer – external.                |                         | Printing.                                     |
| 1.8   | Training design.                        | H&S Trainer.                                |                         |                                               |

## Budget Plan

The purpose of this is to provide financial information for those who will be making decisions about what funds can be made available for your project.

To secure a budget, you need to present a sound case. The planning documents discussed so far help you to demonstrate:

- Your business case for spending the money.
- What the money will be used to buy.
- When the money will be needed.

Finance departments need to know the full extent of your spending plans so they can set money aside accordingly - or tell you in good time that funds won't be available.

The example below comes from the Task Analysis and Project Schedule in the previous pages of this document.

| Cost Centres   |                  |           |                       |               |
|----------------|------------------|-----------|-----------------------|---------------|
| Project Stage  | Cost Item        | Materials | Professional Services | Overall Costs |
| 1.1            | H&S Consultant   |           | 4,800.00              | 4,800.00      |
| 1.2            | Survey software  | 5,000.00  |                       | 5,000.00      |
| 1.3            | H&S Consultant   |           | 2,000.00              | 2,000.00      |
| 1.8            | Technical Writer |           | 4,000.00              | 4,000.00      |
| 1.5            |                  |           |                       |               |
| <b>TOTALS:</b> |                  | 5,000.00  | 10,800.00             | 15,800.00     |

Cost centres are the account headings under which different items are recorded. Organisations record financial details in this way to see how much they have spent on similar items over the course of a year. The example shows only two cost centres, but there may be many more. The cost centres you use should, in reality, match those used in your organisation.