PROJECT PLAN CHECKLIST

project management process

1. **Agree precise specification for the project.**
2. **Plan the project - time, team, activities, resources, financials.**
3. **Communicate the project plan to your project team.**
4. **Agree and delegate project actions.**
5. **Manage, motivate, inform, encourage, enable the project team.**
6. **Check, measure, review project progress; adjust project plans, and inform the project team and others.**
7. **Complete project; review and report on project performance; give praise and thanks to the project team.**

1 Agree precise specification for the project

Often called the project 'terms of reference', the project specification should be an accurate description of what the project aims to achieve, and the criteria and flexibilities involved, its parameters, scope, range, outputs, sources, participants, budgets and timescales (beware - see note below about planning timescales).

Usually the project manager must consult with others and then agree the project specification with superiors, or with relevant authorities. The specification may involve several drafts before it is agreed. A project specification is essential in that it creates a measurable accountability for anyone wishing at any time to assess how the project is going, or its success on completion. Project terms of reference also provide an essential discipline and framework to keep the project on track, and concerned with the original agreed aims and parameters. A properly formulated and agreed project specification also protects the project manager from being held to account for issues that are outside the original scope of the project or beyond the project manager's control.

This is the stage to agree special conditions or exceptions with those in authority. Once you've published the terms of reference you have created a very firm set of expectations by which you will be judged. So if you have any concerns, or want to renegotiate, now's the time to do it.

The largest projects can require several weeks to produce and agree project terms of reference. Most normal business projects however require a few days thinking and consulting to produce a suitable project specification. Establishing and agreeing a project specification is an important process even if your task is simple one.

A template for a project specification:

1. Describe purpose, aims and deliverables.
2. State parameters (timescales, budgets, range, scope, territory, authority).
3. State people involved and the way the team will work (frequency of meetings, decision-making process).
4. Establish 'break-points' at which to review and check progress, and how progress and results will be measured.

2 Plan the project

Plan the various stages and activities of the project. A useful tip is to work backwards from the end aim, identifying all the things that need to be put in place and done, in reverse order. First, brainstorming (simply noting ideas and points at random), will help to gather most of the points and issues. For complex projects, or when you lack experience of the issues, involve others in the brainstorming process. Thereafter it's a question of putting the issues in the right order, and establishing relationships and links between each issue. Complex projects will have a number of activities running in parallel. Some parts of the project will need other parts of the project to be completed before they can begin or progress. Some projects will require a feasibility stage before the completion of a detailed plan.

project timescales

Most projects come in late - that's just the way it is - so don't plan a timescale that is over-ambitious. Ideally plan for some slippage. If you have been given an fixed deadline, plan to meet it earlier, and work back from that earlier date. Build some slippage or leeway into each phase of the project. Err on the side of caution where you can. Otherwise you'll be making a rod for your own back.

the project team

Another important part of the planning stage is picking your team. Take great care, especially if you have team-members imposed on you by the project brief. Selecting and gaining commitment from the best team members - whether directly employed, freelance, contractors, suppliers, consultants or other partners - is crucial to the quality of the project, and the ease with which you are able to manage it. Generally try to establish your team as soon as possible. Identifying or appointing one or two people even during the terms of reference stage is possible sometimes. Appointing the team early maximises their ownership and buy-in to the project, and maximises what they can contribute. But be very wary of appointing people before you are sure how good they are, and not until they have committed themselves to the project upon terms that are clearly understood and acceptable. Don't imagine that teams need to be full of paid and official project team members. Some of the most valuable team members are informal advisors, mentors, helpers, who want nothing other than to be involved and a

few words of thanks. Project management on a tight budget can be a lonely business - get some help from good people you can trust, whatever the budget.

To plan and manage large complex projects with various parallel and dependent activities you will need to put together a 'Critical Path Analysis' and a spreadsheet on MS Excel or equivalent. Critical Path Analysis will show you the order in which tasks must be performed, and the relative importance of tasks. Some tasks can appear small and insignificant when they might actually be hugely influential in enabling much bigger activities to proceed or give best results. A Gantt chart is a useful way of showing blocks of activities over time and at a given cost and for managing the project and its costs along the way.

Various project management software is available, much of which is useful, but before trying it you should understand and concentrate on developing the pure project management skills, which are described in this process. The best software in the world will not help you if you can't do the key things.

the project 'critical path analysis'

'Critical Path Analysis' sounds very complicated, but it's a very logical and effective method for planning and managing complex projects. This is how to create a critical path analysis. As an example, the project is a simple one - making a fried breakfast.

First note down all the issues (resources and activities in a rough order):

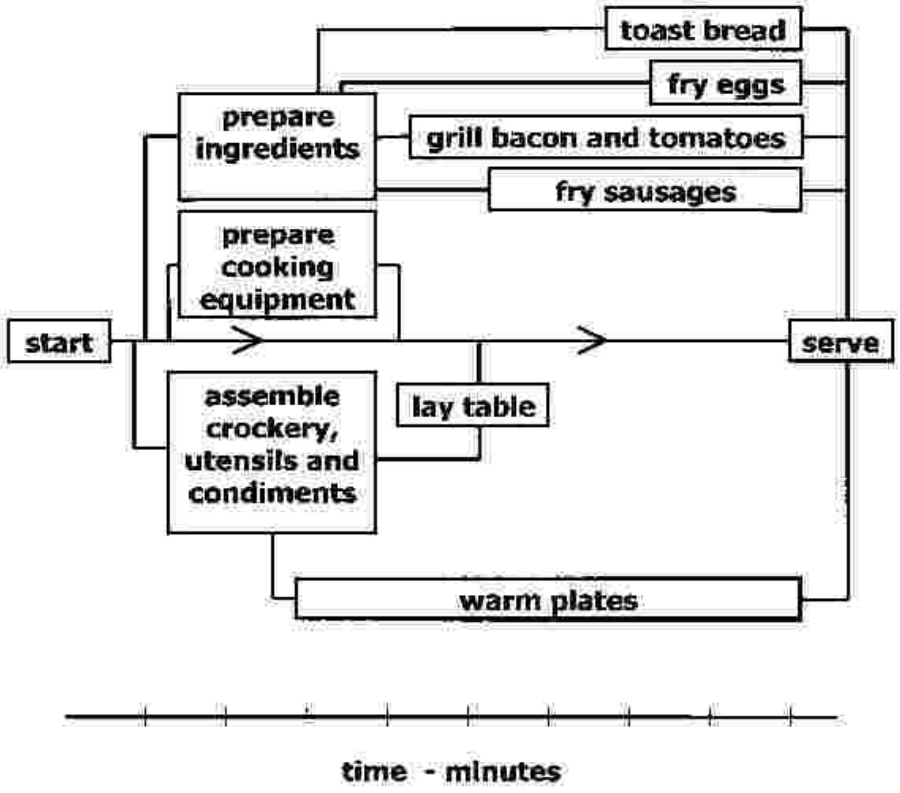
Assemble crockery and utensils, assemble ingredients, prepare equipment, make toast, fry sausages and eggs, grill bacon and tomatoes, lay table, warm plates, serve.

Note that some of these activities must happen in parallel. That is to say, if you tried to make a fried breakfast by doing one task at a time, and one after the other, things would go wrong. Certain tasks must be started before others, and certain tasks must be completed in order for others to begin. The plates need to be warming while other activities are going on. The toast needs to be toasting while the sausages are frying, and at the same time the bacon and sausages are under the grill. The eggs need to be fried last. A critical path analysis is a diagrammatical representation of what needs done and when. Timescales and costs can be applied to each activity and resource. Here's the critical path analysis for making a fried breakfast:

This critical path analysis example below shows just a few activities over a few minutes. Normal business projects would see the analysis extending several times wider than this example, and the time line would be based on weeks or months. It is possible to use MS Excel or a similar spreadsheet to create a critical path analysis, which allows financial totals and time totals to be planned and tracked. Various specialised project management software enable the same thing. Beware however of spending weeks on

the intricacies of computer modelling, when in the early stages especially, a carefully hand drawn diagram - which requires no computer training at all - can put 90% of the thinking and structure in place. (See the details about the most incredible planning and communications tool ever invented, and available for just a tiny fraction of the price of all the alternatives.)

project critical path analysis example

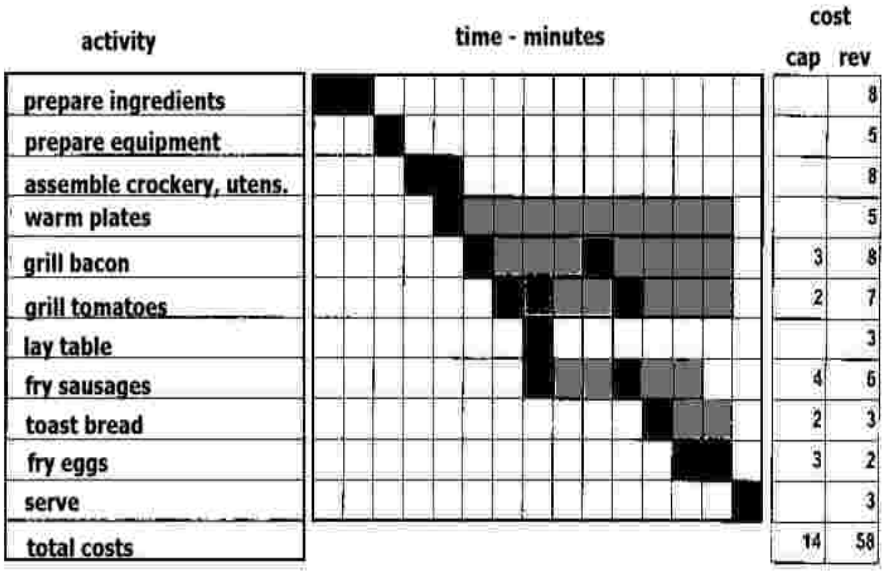


Gantt charts

Gantt Charts are extremely useful project management tools. You can construct a Gantt Chart using MSExcel or a similar spreadsheet. Every activity has a separate line. Create a time-line for the duration of the project (the breakfast example shows minutes, but normally you'd use weeks, or for very big long-term projects, months). You can colour code the time blocks to denote type of activity (eg intense, watching brief, directly managed, delegated and left to run, etc.) You can schedule review and break points. At the end of each line you can show as many cost columns for the activities as you need. The breakfast example shows just the capital cost of the consumable items and a revenue cost for labour and fuel. A Gantt chart like this can be used to keep track of progress for each activity and how the costs are running. You can move the time blocks around to report on actuals versus planned, and to re-schedule, and to create new plan

updates. Costs columns can show plan and actuals and variances, and calculate whatever totals, averages, ratios, etc you need. Gantt Charts are the most flexible and useful of all project management tools, but remember they do not show the importance and inter-dependence of related parallel activities, and they won't show the necessity to complete one task before another can begin, as a critical path analysis will do, so you need both tools, especially at the planning stage.

Gantt chart example



project financial planning and reporting

For projects involving more than petty cash you'll need a spreadsheet to plan and report planned and actual expenditure. Use MSExcel or similar. If you don't know how to put together a basic financial plan, get some help from someone who does, and make sure you bring a good friendly, flexible financial person into your team - it's a key function of project management, and if you can't manage the financial processes your self you need to be able to rely completely on whoever does it for you. The spreadsheet must enable you to plan, administer and report the detailed finances of your project. Create a cost line for main expenditure activity, and break this down into individual elements. Create a system for allocating incoming invoices to the correct activities (your bought-ledger people won't know unless you tell them), and showing when the costs hit the project account. Establish clear payment terms with all suppliers and stick to them. Projects develop problems when team members get dissatisfied; rest assured, non- or late-payment is a primary cause of dissatisfaction.

Remember to set some budget aside for 'contingencies' - you will need it.

project contingency planning

Planning for and anticipating the unforeseen, or the possibility that things may not go as expected, is called 'contingency planning'. Contingency planning is vital in any task when results and outcomes cannot be absolutely guaranteed. Often a contingency budget needs to be planned as there are usually costs associated. Contingency planning is about preparing fall-back actions, and making sure that leeway for time, activity and resource exists to rectify or replace first-choice plans. A simple contingency plan for the fried breakfast would be to plan for the possibility of breaking the yolk of an egg, in which case spare resource (eggs) should be budgeted for and available if needed. Another might be to prepare some hash-browns and mushrooms in the event that any of the diners are vegetarian. It may be difficult to anticipate precisely what contingency to plan for in complex long-term projects, in which case simply a contingency budget is provided, to be allocated later when and if required.

3 Communicate the project plan to your team

This serves two purposes: it informs people what's happening, and it obtains essential support, agreement and commitment. If your project is complex and involves a team, then you should involve the team in the planning process to maximise buy-in, ownership, and thereby accountability. Your project will also benefit from input and consultation from relevant people at an early stage.

4 Agree and delegate project actions

Your plan will have identified those responsible for each activity. Activities need to be very clearly described, including all relevant parameters, timescales, costs, and deliverables. Use the SMART acronym to help you delegate tasks properly. See the delegation tips and processes. When delegated tasks fail this is typically because they have not been explained clearly, agreed with the other person, or supported and checked while in progress. So publish the full plan to all in the team, but don't issue all the tasks unless the recipients are capable of their own forward-planning. Long-term complex projects need to be planned in more detail, and great care must be taken in delegating and supporting them. Don't delegate anything unless it passes the SMART test.

5 Manage, motivate, inform, encourage, enable the project team

Manage the team and activities by meeting, communicating, supporting, and helping with decisions (but not making them for people who can make them for themselves). 'Praise loudly; blame softly.' (Catherine the Great). One of the big challenges for a

project manager is deciding how much freedom to give for each delegated activity. Tight parameters and lots of checking are necessary for inexperienced people who like clear instructions, but this approach is the kiss of death to experienced, entrepreneurial and creative people. They need a wider brief, more freedom, and less checking. Manage these people by the results they get - not how they get them. Look out for differences in personality and working styles in your team. They can get in the way of understanding and cooperation. Your role here is to enable and translate. Face to face meetings, when you can bring team members together, are generally the best way to avoid issues and relationships becoming personalised and emotional. Communicate progress and successes regularly to everyone. Give the people in your team the plaudits, particularly when someone high up expresses satisfaction - never, never accept plaudits yourself. Conversely - you must take the blame for anything that goes wrong - never dump on anyone in your team (as project manager any problem is always ultimately down to you anyway).

6 Check, measure, and review project performance; adjust project plans; inform project team and others

Check the progress of activities against the plan. Review performance regularly and at the stipulated review points, and confirm the validity and relevance of the remainder of the plan. Adjust the plan if necessary in light of performance, changing circumstances, and new information, but remain on track and within the original terms of reference. Be sure to use transparent, pre-agreed measurements when judging performance. (Which shows how essential it is to have these measures in place and clearly agreed before the task begins.) Identify, agree and delegate new actions as appropriate. Inform team members and those in authority about developments, clearly, concisely and in writing. Plan team review meetings. Stick to the monitoring systems you established. Probe the apparent situations to get at the real facts and figures. Analyse causes and learn from mistakes. Identify reliable advisors and experts in the team and use them. Keep talking to people, and make yourself available to all.

7 Complete project; review and report on project; give praise and thanks to the project team

At the end of your successful project hold a review with the team. Ensure you understand what happened and why. Reflect on any failures and mistakes positively, objectively, and without allocating personal blame. Reflect on successes gratefully and realistically. Write a review report, and make observations and recommendations about follow up issues and priorities - there will be plenty.

Source (Businessballs.com)