



Project Guidelines

The Project Guidelines cover the three major components of successful projects:

1. Preparing the project
2. Planning the project
3. Implementing the project

Preparation

The first step in preparing for a project is to complete what we call the Project Contract. This ensures everyone involved (the team, outside vendors etc) is on the same page, understands exactly what the project is about and agrees on the scope. A project contract should contain the following sections.

Name

Give the project a name that resonates with everyone. This brings the project to life, aids in communication and adds a zing to the initiative. Make it fun and exciting!

Strategic Priority/Goal

Projects are usually the result of a strategic direction and so there will often be a strategic Priority and/or Goal associated with the project. This connects the project to the strategic plan.

Description – Paint a Picture

This is about clarity. It ensures the team has a common understanding of what the project is all about so there are no misunderstandings.

Desired Outcomes

To ensure further clarification and avoidance of misunderstandings the team agrees on the desired outcome when the project is complete. For example, if the project is to create and launch a new product the picture might look like this:

On completion of the “New Product Project” (NOT an exciting name☺) the product is launched, which means:

- *Product is ready for purchase*
- *Announcement went to 1,000 people*
- *It is on the website*
- *Everyone has been trained on product delivery*
- *Marketing material is done etc.....*

Scope - Includes/Excludes

To successfully manage scope creep it is necessary for the team to agree what is included in and excluded from the project.

Milestone Dates

Although the project plan has not been developed at this stage there may be key milestone dates that everyone must be aware of. For example, if the project must be completed before year end it is noted here.

Team

The names and their roles of everyone involved in the project. At the very least there should be a Project Champion and a Project Manager in place at this early stage.

Budget

If a budget has been approved for this project include the details here.

Careful preparation at the beginning of a project will never guarantee success but it will lessen the probability of failure. So take time to work through a project contract AND get everyone's agreement on its content.

Project Planning – the Five Step Process

Everyone who will be involved in the project must have an active role in planning the project. If they are not actively involved they will not commit. If they don't commit you are embarking on a project that is destined to failure – guaranteed!

The Five Step Process is:

Step 1 – List all the tasks required to get you from the current situation to project completion. Give each task a unique number and a name; this helps to avoid confusion during the planning and management of the project.

Step 2 – Identify the dependencies between tasks. That is, before you can start Task 7 you realize Task 3 must be completed. In the *“New Product Project”* example above the marketing material content and design must be complete before you can print it.

Step 3 – Assign the task to someone. Will the task need more than one person? If so who will have overall responsibility. Make sure you are matching skills and experience to the task and not just assigning Frannie because she is not very busy at the moment (sorry Frannie).

Step 4 – Estimate the time to complete each task. Add 10% to 25% to your estimate to allow for surprises. Why such a wide range? If you understand the task really well and it is a short task add 10%. If the task is not very clear and it has lots of complexities add 25%.

Step 5 – Put the tasks into a timeline. Remember the dependencies and allow for lapse time. Lapse time plays an enormous role if an assigned person can only work on the task part-time.

If the end of the timeline is unacceptable don't just arbitrarily change all the estimates. That won't work. You must either accept the result or **remove** some tasks from the plan to bring the timeline into sync with your requirements.

Now the plans are in place you are ready for the exciting part; implementing the project!

Implementing the Project

“How do projects fall behind schedule?” Answer: “One day at a time”. Projects must be managed closely at all times, every day. When things change (and they will) act immediately; don't wait.

Here is the most important lesson learnt from our many years of planning and managing projects. If someone reports they didn't finish a task on time but will “catch up next week”; be assured they will not catch up next week! Rearrange the plan. Take something out or adjust the end date.

Here are other important lessons we have learnt about managing projects:

- Murphy's Law states that if anything can go wrong it will. O'Toole thinks Murphy an optimist.
- If one person is assigned a task and you add a second person the task will not be completed in half the time.
- Don't kid yourself ... or others. You may want to complete the project by year end but if the timeline tells you otherwise do not assume you will find a way to shrink task estimates and complete it to your desired year end.
- Tasks never take less time than the estimates. They usually take longer.
- Most if not all the people working on a project will have other duties and priorities in the company. The project is often an added burden and must be managed as such.
- Managing a project team is very different than managing an operations team or a sales team.
- Projects are sometimes viewed as an added part-time activity that must not take precedence over current responsibilities. Consequently, they are never done! A classic example; a salesperson is assigned a project task

but is also expected to fulfill her sales quota. What would you do if you were in her shoes?

Projects are an essential ingredient to business success. But they are difficult and complex and are usually being executed by people who are not experienced in project work. So they are high risk. There are no guarantees in the world of business but if you do follow these guidelines you will increase the probability of executing projects with some success, with less stress for everyone involved and a lower risk of harming your company in a major way. Hey, that's a good thing!

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