

Project Planning Part One – The First Six Weeks

Congratulations! You just received notice that your proposal was successful for a major development program that the company put a lot of effort into winning. There is a big “Win Party” at the big boss’ place this evening. You better go and enjoy yourself because by tomorrow you know you will be receiving emails asking what day your first program review will be held.

Before you start scheduling that review, you had better make sure that all of your ducks are in a row. Although, some people believe that a lackluster first meeting will set the expectation level nice and low for future meetings. I am willing to bet that job security for those people is a constant worry. As far as I am concerned, there is nothing worse than having to look bad at the very first management briefing. It is imperative that you set the tone from the beginning that you know what you have to get done and you are in full and total control. You want management to also understand how you plan to get the project completed on schedule and within budget. You want people to walk out of that room knowing that they made the right choice by putting you in charge of this high profile project. If you make the right first impression, your management team will trust that you can and will manage a successful project.

So, what is the first step to managing a successful project? Most people think that it is getting a project with a lot of time and money. Well, even those people need to do something very fundamental to make a project succeed. Planning is the first step to managing a successful project. I believe the old adage goes, “if you fail to plan, you plan to fail”. Nothing could be more true. As a matter of fact, if you wait until you find out if you won the proposal before you do any program planning you can be guaranteed that you will be behind schedule from the beginning. What do I mean by that? Well, the project manager is usually selected in advance of a project being awarded by a customer. But, even if you were not given a few weeks notice, these steps will ensure that you get off to a good start. So the lucky project manager has to make some time to think before he or she has to make the first move. During this time, it is an excellent idea for the project manager to put together an interim six-week plan. This six-week plan will serve as your personal guide for getting off to a good start. Developing a six-week plan in MSProject should take a few hours at most. However, instead of developing this plan all on your own, you should enlist

the help of the people that worked on the proposal and the people that you will be recruiting to join your project team.

A few of the basic activities that your six-week plan must include are:

Resource Identification – This is where you set aside time to identify what resources you need to succeed. This includes people, equipment and facilities as well as any other items that your organization considers resources. Make sure that you involve your key project personnel in this process. You may even have to re-do this process if your key project people are not chosen until you have gotten to this step. However, make sure that you involve them as early as possible. If the project has not been awarded

yet, it is a good idea to bounce some ideas off of the department managers that will allocate resources to your project. If you provide them with options you are much more likely to get what you want than if you just wait for them to come to a conclusion on their own. Also (this one is important so pay attention), make sure you have more than one option. For example, if you want Joe for your project but you know Joe is always in high demand, make sure that you have a Plan B. Your Plan B should be someone that you are comfortable can get the job done. In the world of plant, property and equipment you have to identify what you need and who is responsible for making the allocation. Occasionally some items need to be scheduled months in advance. Your project may require a thermal testing chamber that is in high demand at all times. You should find out how you get on the schedule and what the likelihood is that you can use the chamber when you need it. You should also develop a back-up plan by identifying a local vendor that can run the test for you just in case your in-house people cannot support you. If you do end up having to go to an outside vendor you have to make sure that you

Another thing to consider is your organization politics. Certainly not all department managers are old hairy trolls in disguise. But, for the ones that are, maybe you should do a little homework with your fellow project managers. Does the Director of Engineering always say no to a first request? Well, make your first request your Plan B and your second request Plan A. Office politics is a dirty world that all good project managers should avoid encouraging. Project managers should be guided by doing whatever is best for the project. However, if you expect to succeed in your endeavor, you had better understand how the dirty little world works. You don't have to like the game, but you better understand the rules. You can be assured that if you know the game, you can get anything you want. Just remember, don't get caught up in office politics. If the politics become unbearable, talk to your project office Director. He or she will likely be able to either help you through the political maze or just knock all of the walls down so you can get right where you need to be. Be careful about playing this card too often or else you will not be viewed as anything more than a person that cannot get anything done without involving your management. A good project manager knows when to ask for help. A great project manager knows when not to ask for help.

have put aside money and time for writing statements of work and using the procurement department to setup the vendor purchase order. A lot of these extra expenses can usually be mitigated by simple early identification of resource requirements and proper scheduling.

Long-Lead Activities – These are the activities that are going to be the “long-pole in the tent”. For example, you may need to purchase a specialized piece of computer equipment for your design team. The vendor may have a lead-time of eight weeks. This means you will have to wait eight weeks before your designers can get started. You had better get this part on order as soon as you receive authorization for project start from your customer. You probably can fill out the procurement paperwork before the project is awarded. Having the paperwork pre-filled out is only the first part of this puzzle. You must also let your procurement people know that you will be sending them paperwork that will require their immediate attention. As a back-up plan you could get whatever approvals are required to buy these high risk items on a credit card so that either you or one of the designers that needs the equipment can handle the task and not have to go through all of the normal procurement wickets. Of course you as the project manager are charged with following and enforcing company policy. If it is against your company policy to procure hardware on a credit card then you must make sure that you get the proper approvals. With proper project planning you will be able to overcome most of the issues related to long-lead activities. You should also identify alternatives and work-around plans for any long-lead activity. Not all long-lead activities are procurement related. Sometimes a simple trade-study must be performed before a component can be selected. Typically all of these items would fall on the critical path of your project plan. However, since you do not have a team together to create the project plan you will have to do your best. Again, communicate with the people who wrote the proposal and the people that will eventually be on your project team. They will all have good ideas of what could potentially be long-lead activities. Once you understand their concerns you will be able to make relevant and beneficial decisions for the overall project.

Team Building Activities – It is absolutely essential that you build your team within the first six weeks. You are going to be faced with enough challenges, you need to make sure that staffing is not one of them. The first step is to identify and make friends with your technical guru. Nothing is worse than a technical guru that constantly undermines your authority. Remember, there are three pieces to project management; cost, schedule &



technical. Your job is not to be the expert in any of those three, but rather to be the expert in how to manage all three with expertise in risk management. Without a good relationship with your technical lead you can get into big trouble. It might not be your ideal situation, and you might even have to cow-tow to the ego (we all know that techies have HUGE egos ☺) but in the long-run you will be glad you did it. A little humility on your part might just help you develop a relationship that will be beneficial long after the project is complete. A really good technical guy is something every project manager needs in his or her back pocket. This person is your conscience... especially when your cost and schedule targets demand that you defy Physics. It goes without saying that you need good cost and schedule people also. However, a good project manager can usually take up some of the slack here as long as they have access to good information. Those weenies in accounting are the only ones that can provide you with accurate cost data. Make sure that you get to know the person that will provide you with that information because it will be essential that you know exactly how much money you have every time you need to make a decision. On the schedule side; learn how to use MSProject. It is not that hard. You can spend half of a day and learn the basics. If nothing else, it will allow you to run your own analyses on critical path items at your own leisure. Sure, a big enough project will have a designated planner to do this for you. What if that guy or girl is on vacation or they are multi-tasked and cannot get an answer for you immediately? It is a good idea that you know how to get in, manipulate and make sense of MSProject files. Microsoft has an online tutorial that will have you up and running in a matter of hours. Now, do not take this the wrong way. People train for years to become experts. Those are the people you want submitting your Integrated Master Schedule (IMS) to your customer. You also never want to actually save a change you made to a master file if you have a designated planner. We will get into baseline management and integrity in the future, but for now just do not even think about it unless you are the one charged with maintaining the documentation for baseline integrity. Overall, you should know your team at the end of six weeks. Your team should know you by the end of six weeks. Most importantly, you should trust each other by the end of the first six weeks of your project. The people on your team are going to be the difference as to whether you succeed or fail. All the certifications and knowledge in the world will not help if your team does not trust that you will lead them in the best direction for the program.

To Be Continued...