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# There's Always Time for Pragmatic Project Planning

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Bob Galen

RGalen Consulting Group, LLC

[www.rgalen.com](http://www.rgalen.com)

[bob@rgalen.com](mailto:bob@rgalen.com)

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# Outline

- Introduction
- Project Chartering – as a visioning mechanism
- Sticky Note Planning (SNP) – as your general planning approach
- Monitoring progress & making adjustments
- Close

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# Introduction

- Projects (managers & teams) usually talk a good game around planning, however –
  - Less than half ever pull together a thoughtful & complete plan for their projects
  - If they do plan, significant work usually begins before the plan is complete
  - Of these plans, rarely are they maintained as project adjustments are made
  - By the end they're typically out-of-date and irrelevant, while everyone moves onto the next project

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# Introduction

- Why is that?
- Schedule pressure – no time
- Focus on results over paper
- Value proposition
  
- Planning competency
- Teamwork and collaboration
- Actualize the plans & effort to make adjustments

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# Let's Define Planning

- The initial and subsequent acts within software projects of identifying the –
  - Steps & Dependencies
  - Strategies & Approaches
  - Goals & Objectives
  - People & Structures
  - Limits & BoundariesTo be used to guide work for the project
- Typically it's a series of artifacts covering these areas

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# Chartering

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# Chartering Defined

## What is it?

It's a *Process* and *Artifacts* that:

- ❑ Establishes the vision state for the project
- ❑ Defines key goals & requirements
- ❑ Captures and sets customer expectations
- ❑ Defines project participants and their roles
- ❑ Defines limits and constraints
- ❑ Establishes all resource needs and overall costs targets
- ❑ Creates a high level view to the WBS and schedule
- ❑ Initiates negotiation and tradeoffs
- ❑ Ultimately defines success

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# Chartering

## Another View

*A charter is a central document and a set of supporting documents that defines the purpose, nature and characteristics of an about to be undertaken software project.*

*It is typically constructed early in the project lifecycle, hopefully before the project is staffed and the business is pushing for a delivery date. It is usually created collaboratively as a team and shared with stakeholders upon completion.*

*It is intended to clearly set the stage for the project—aligning the team and setting goals and expectations.*

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# Charter Components

- **Purpose**
  - Primary rational, compelling and clear, mission and vision for the effort
- **Goals**
  - Technical, business, product, and team objectives
- **Scope**
  - Customer needs, requirements, bounds
- **Organization**
  - Executive / stakeholder, project, functional organization structures
- **Resources**
  - Space, equipment, people, skill sets & capabilities, collaboration support, tools

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# Charter Components

- **Approaches**
  - Strategy, methodologies, processes, tools, & techniques
- **Priorities**
  - Ordering, importance, trade-offs, relative to other projects
- **Assumptions & Constraints**
  - Restrictions, limits, bounds – team, process, product, & schedule
- **Risks**
  - Top n risks, known, previous history, uncertainty elaborated
- **Signoff**
  - Stakeholders

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# Chartering Process

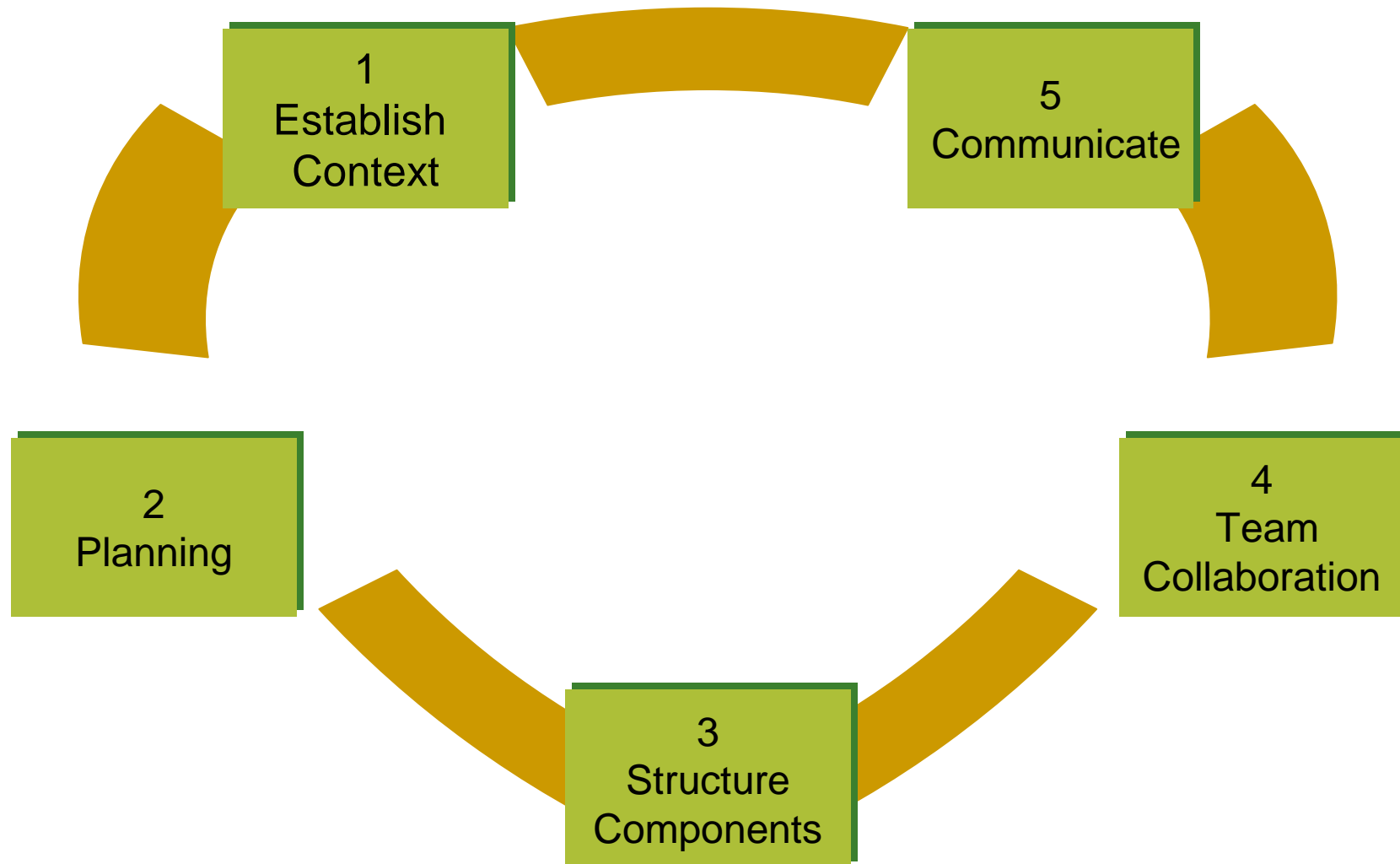
Beyond the documents themselves is the process for generating them. Basic steps include –

- 1. Establishing Mission, Vision, Purpose and Goals**
- 2. Team Formation, Define Roles & Responsibilities, Mapping Skills**
- 3. High-Level Planning, Risk Analysis, Create Schedule**
- 4. Stakeholder Support, Management Understanding and Team Buy-in**

# Chartering Process Flow



# Iterative Chartering Process



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# Chartering

## 3 Primary Contexts

### ■ In the *Beginning*

- To establish the initial direction, to generate momentum, to create commitment

### ■ Whenever there is *Directional Confusion*

- To re-establish the direction – goals, mission, and requirements because some part of the context has changed

### ■ As a project *Recovery* mechanism

- Based upon some sort of failure, chart the steps towards a recovery

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# Chartering

## More Subtle Outcomes

- Team + Stakeholder = alignment & shared commitment
- Shared understanding of requirements and critical success factors
- Input for rewards, recognition, and performance evaluation
- Guidance for the planning focus – level & direction
- Corrective actions and risk analysis

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# Charter Planning

- Iterative & minimalist approach
  - Consider notions of Just Enough and Just In Time
- For each component of the Charter consider whether:
  - It's required for this context?
  - If so, do you need partial or full exploration?
  - Define exactly what is required?
  - Try to leverage previous context or information
  - Who needs to be involved?

# Charter Planning Tool

Charter Component	Project Type		
	New or Green Field	Maintenance or Recurring	Corrective Actions
<b>Purpose</b>	Always	Focused	Very focused
<b>Goals</b>	Always	Focused	Very focused
<b>Scope</b>	Always	Focused	Very focused
<b>Organization</b>	Always	As required	As required
<b>Resources</b>	Always	As required	Usually not
<b>Approaches</b>	Always	Always	Always
<b>Priorities</b>	Always - Broad	Focused	Very focused
<b>Assumptions &amp; Constraints</b>	Always	As required	As required
<b>Risks</b>	Always	As required	Always
<b>Sign-off</b>	Always	Always	As required

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# Sticky Note Planning - SNP

# SNP

## Characteristics

- Similar to:

- JAD Sessions,
- Collaborative Requirements Workshops,
- XP Planning Game,
- Crystal Blitz Planning,
- Agile Planning Poker (Wideband)

### Key Characteristics:

- **Team Based** – inclusive of all team members performing the work
- **Facilitated** – roles include facilitator, scribe, customer & thoughtfully planned
- **Fast** – quickly produce artifacts for tasks and risks
- **Group Collaboration** – task identification, ordering, sizing, assignment and risk identification

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# SNP Workflow

1. Scope Definition
  - Context & Chartering
2. Familiarize Key People
  - Training
3. Prepare for the Workshop
  - Planning
4. Conduct the Workshop
  - Meeting
5. Produce Documents
  - Results

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# SNP

## Context Points

### ■ Project

- Green field, maintenance, repetitive, skill, new vs. old technologies, 3<sup>rd</sup> parties & outsourcing

### ■ Methods

- Methodologies, your SDLC nuance, processes, culture, team size & distribution

### ■ Business

- Product domain, business / market landscape, stakeholder expectations

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# SNP

## Planning

- Attendees
  - Composed team, SME, Customer, Stakeholders
  
- Roles
  - Scribe, facilitation, SME, customer facing
  
- Planning
  - Define the opportunity & challenge
  - Training needs
  - Location & support logistics
  - Meeting timing, flow, impediment analysis
  - Size & scaling (sub-teams and roll-up)

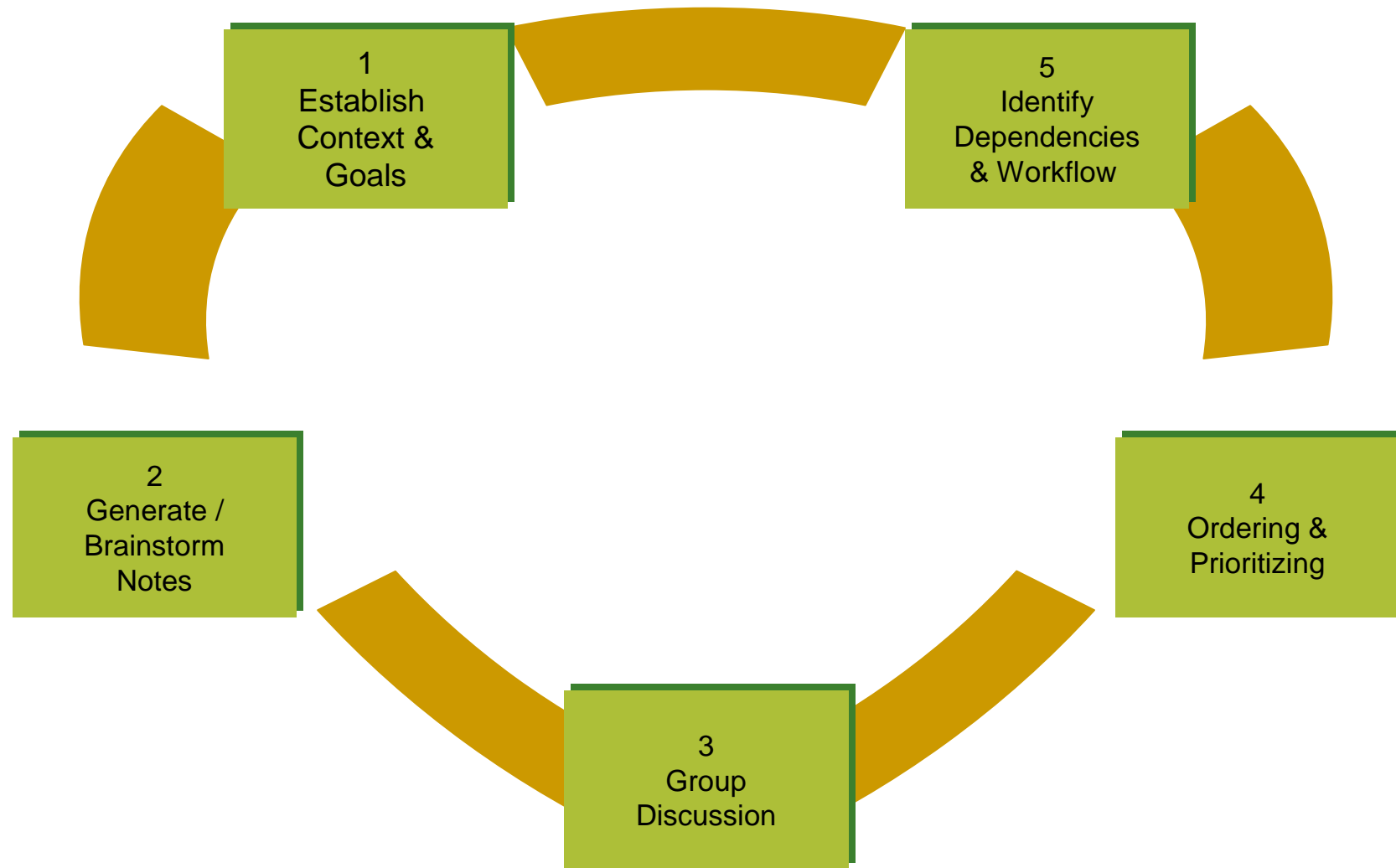
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# SNP

## Meeting

- Facilitated & focused brainstorming session
  
- For mission, scope, requirements, constraints
  - Generation & prioritization
  
- For Planning
  - Task generation, sequencing & dependencies
  - Assignment and effort estimation
  - Surfacing risks & prioritization
  - Develop implementation strategy

# SNP Meeting - Iterative Flow



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# Sticky Note

## Sample Format

Card # or Type? (T)ask, (R)isk, (I)ssue, (S)tory, (F)eature		
Description of Activity or Function		
Resource Assignment Recommendation	Level of Effort Estimate or Complexity	

# SNP Meeting



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# SNP

## Scaling Factors

- Required level of the planning
  - Gross vs. fine level clarity and detail
  
- Size of the overall team and/or project scope
  - Small < 5, Medium, < 15, Large 15 – 30+ and system partitioning / architecture
  
- Speed required of the planning
  - Business requirements, teams' ability
  
- Team & cultural dynamics
  - Worked together before, co-located, domain experience, processes

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# SNP

## Critical Success Factors

1. Early context fact finding to fully understand the situation
2. Planning out the workshop dynamics based on the context
3. Crisp and experienced facilitation. It must move quickly and be rooted in the teams' experience
4. Follow-up to the workshop - pulling together artifacts and socializing changes within the team
5. Leverage the teams experience for trade-off options to meet the core project goals. There is always great wisdom within the team!

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# Making Adjustments

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# Milestones

## Guiding Progress

- “Good” Milestones
  - Provide Alignment – significant events within the projects’ SDLC workflow
  - Are Meaningful – something to “shoot for”
  - Are Measurable – points of progress within the schedule
  
- Use an Earned Value approach
  - Done only when totally complete – so clearly define what “Done” means

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# Establish “Done”ness Criteria

## Example

- For software project tasks they –
  - Help clarify expectations
  - Help properly estimate task duration
  - Help drive quality
  - Help avoid *90% done syndrome*
- What would a development task criteria look like?
  - ✓ Code complete – to agreed conventions
  - ✓ Reviewed (staged)
  - ✓ Unit testing coverage complete
  - ✓ Unit tests passed
  - ✓ Check-in w/o breaking the build
  - ✓ Integration complete
  - ✓ Documentation as required
  - ✓ Exit review w/tester

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# Milestones

## Granularity

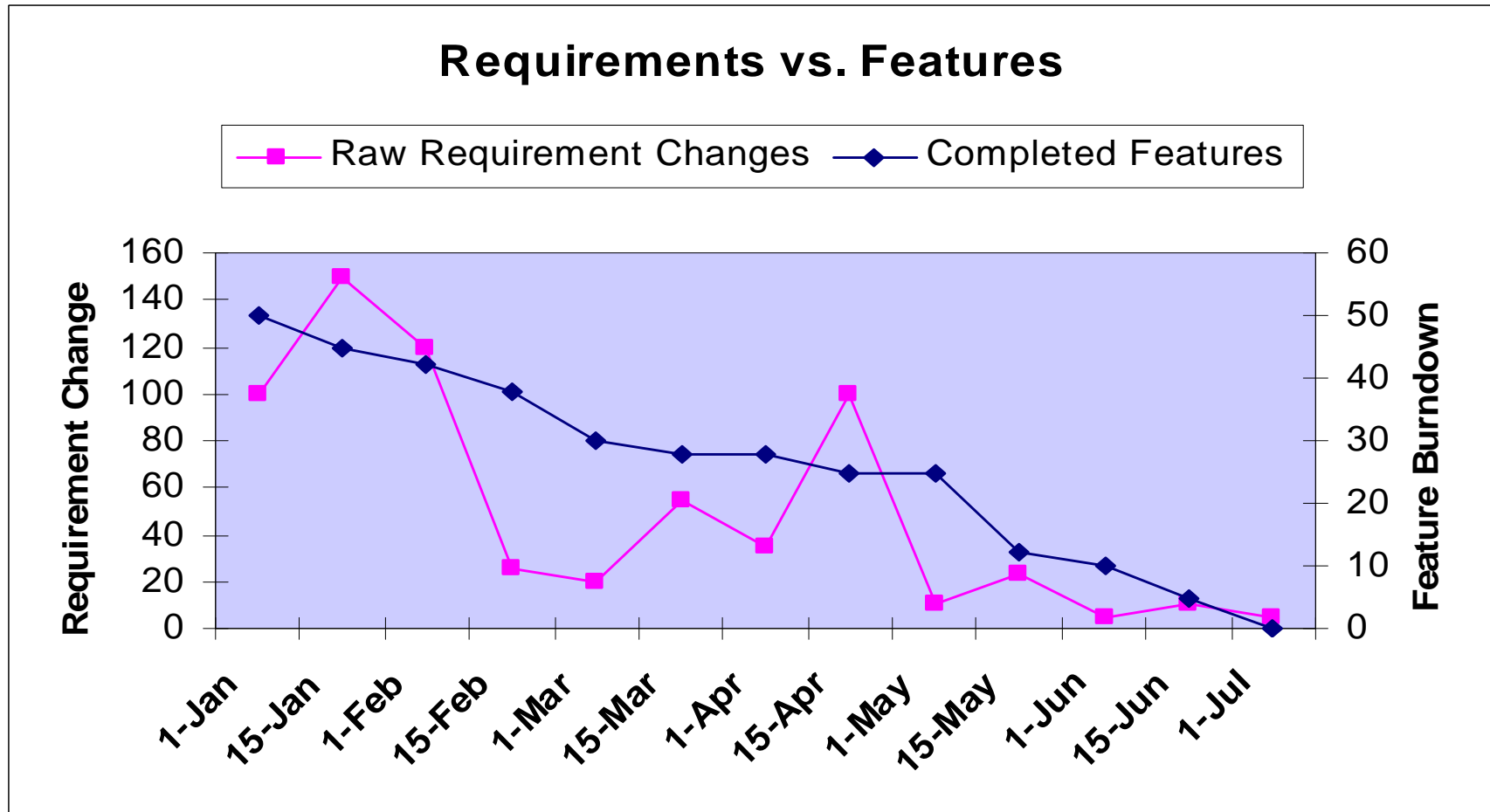
- Normally
  - Methodology & functional alignment
  - 2-3 weeks duration
  
- Inch-pebbles or Micro-stones
  - Individual or small groups
  - 2-3 days, nor more than a week
  - Fine granular tracking to combat – Murphy's Law, Parkinson's Law and Student Syndrome within software projects
  
- Adopt Agile / Lean feedback loops

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# Monitoring & Tracking

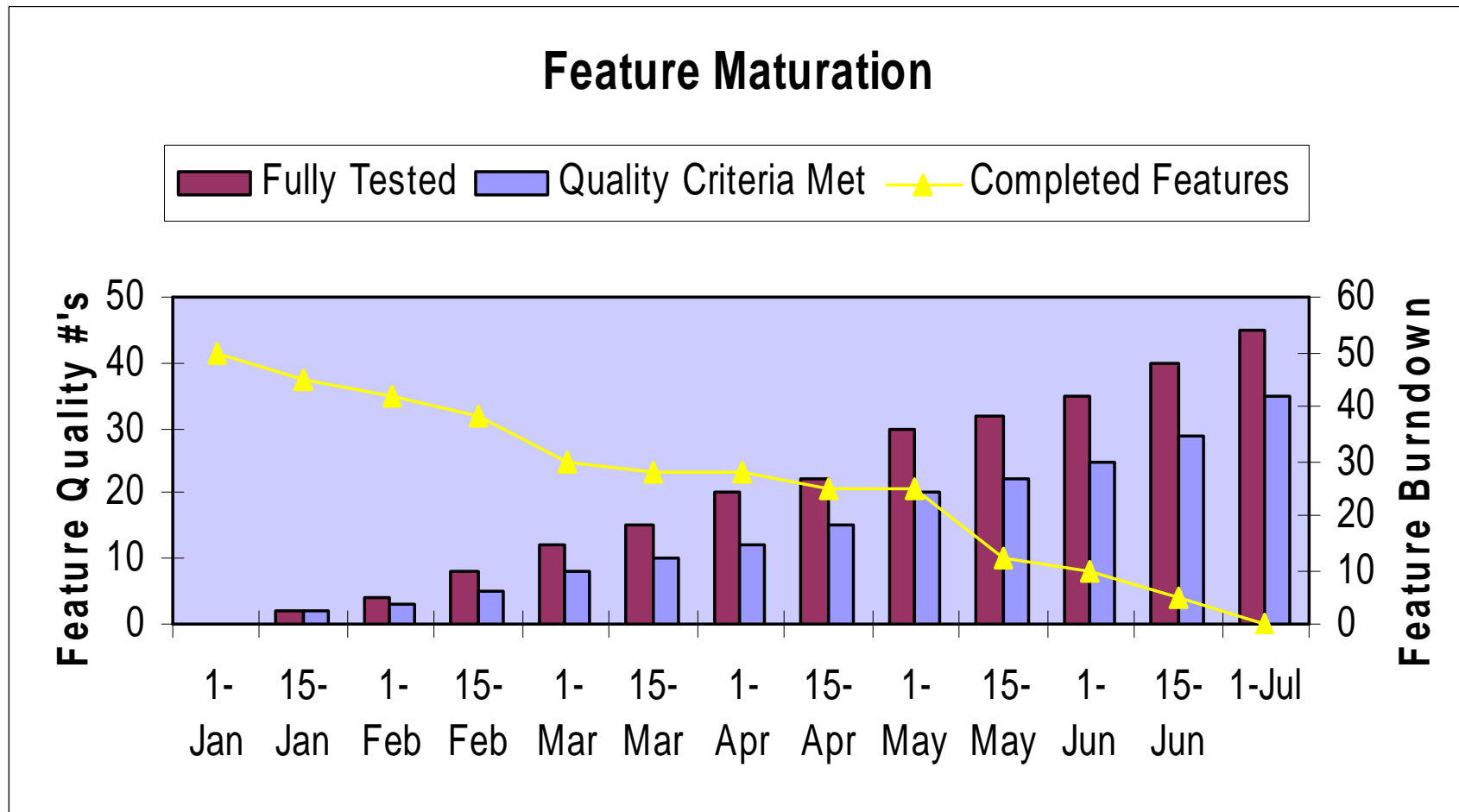
- Daily stand-up meetings
  - From Scrum – Accomplished?, Planned?, Impediments?
  
- Information Radiators
  - From Crystal – Real-time project data for the team to view and consider
  
- Burn down Charts
  - From Scrum / XP – shows work accomplished
  - Functionality:       Features, Use Cases, Stories
  - Quality:               Defects, Test Coverage, Testing

# Burndown Requirements



# Burndown

## Feature Maturation



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# Re-Planning

- Monitor daily, fine granular feedback w/team
    - Instead of periodic efforts; analyze and adjust continuously
  
  - Re-plan using
    - Chartering – to define goals, issues, compromises
    - SNP – focused towards a fine level of granularity
    - Always considering context and team collaboration
- Transparently rebalancing: Scope – Time – Cost –  
Quality
- Update artifacts and re-communicate & re-synch

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## Wrap-up

# Pragmatic Planning

- Chartering
  - Set the vision and adjust (iteratively) as required
  - Always re-synch with your stakeholders
  
- Collaborative planning
  - Plan as a team using card based (SNP-like) techniques
  
- Monitoring & Adjustments
  - Borrow techniques from the agile methods
  - Finely grained visibility & reaction
  - Engage your teams' and trust their guidance

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Questions?

Thank you!

# Contact Info

Robert Galen  
RGalen Consulting Group,  
L.L.C.  
PO Box 865, Cary, NC  
27512  
919-272-0719  
[www.rgalen.com](http://www.rgalen.com)  
[bob@rgalen.com](mailto:bob@rgalen.com)

*Software Endgames: Eliminating Defects,  
Controlling Change, and the Countdown to  
On-Time Delivery* published by Dorset House  
in Spring 2005. [www.rgalen.com](http://www.rgalen.com) for order  
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