

Saybrook Associates

Putting the *Planning* back into Planning and Scheduling

Presented
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Planning Versus Scheduling

- “The Client needs a schedule now.....”

A Map Day more than just a Project Kick Off Meeting

- True Working Session
- People are expected to be prepared
- Leave the meeting with tangible results
 - Commitment dates
 - Clearly defined deliverables
 - Better understanding of the project risks and opportunities

Who to invite?

- A Map Day is designed to be inclusive — everyone who will directly contribute to the project outcomes should be invited

- The Project Sponsor.

- Minimum input from Senior Management

- Bottoms up Planning Session
 - General Foremen
 - Sub-Contractors
 - Key Suppliers

Map Day Preparation

3-4 Weeks Out

- Book the room
- Contact outside facilitator , if necessary
- Notify the team of the date.

2 Weeks Out

- Hold a Map Day planning session with the team who will be driving the Map Day Process
- Make sure you have all necessary materials.

1 Week Out

- Send out a detailed Agenda
- Notify the meeting members to do prework and bring with them.

Map Day Objectives

- Define the goals of the Project
- Opportunity to meet the entire Project Team
- Tests Assumptions
- Clarifies Expectations (who, what, when)
- Builds Commitment
- Defines who needs to deliver what to whom and when
- Defines what is agreed upon or not agreed upon
- Brings to light decisions and/or issues needing early resolution

Room Checklist/Logistics

- Adequate wall space
- Round tables with plenty of room around them to separate the groups.
- At least two note takers with laptops/flip charts
- Cordless microphones/ video camera
- Overhead projectors

Meeting participants need to be prepared

- Send Participants/Groups a pre-work sheet showing them major milestones. The expectation is for them to:
 - Identify the deliverables to meet these milestones
 - Identify the receivables they will need from others
 - Identify any risks/issues/concerns they have
- Include logistics package showing how the meeting will be run / standard forms to be used

Behaviors and Expectations

- This is not a top down management approach
- Each *Group/Individual* will have the opportunity to speak
- If something cannot be resolved at the Map day it will be captured and resolved at a later date.
- Respect the agenda and the time allotted for each activity.

Behaviors and Expectations to Avoid

- Make sure that managers do not dominate the discussion at the expense of individual contributors.
- The Meeting Leader will not participate in all exercises, he/she will make some real-time decisions to keep the meeting focused.

Map Day

- Introduction by Project Sponsor
- Identify One Single Milestone Completion Date
 - Everyone on the team is working to the same goal
 - Nobody wants to be the person/group to cause that date to move



11-June- 2010

Agenda and Timetable

Introduction and Expectations	Contract for behaviors and outcomes	8:00-8:30
Step 1-Level 1 Review	Alignment and understanding of L1 milestones	8:30-9:05
Step 2-Create Level 2 Map	ID L2 Milestones, and create L1 templates and wall map	9:05-10:45
Break	at team's discretion	9:30-9:45
Step 3-Contract Deliverables and ID Gaps	Gain agreement between segments; begin comprehending interdependencies	10:45-12:00
Lunch		12:00-12:45
Step 4-Update Level 2 Map	Incorporate and negotiate closure to feedback	12:45-2:00
Break		2:00-2:15
Step 5-Define Criteria and Measurement for Deliverables	Provide customer input into expectations for quality, timeliness, etc	2:15-4:00
Step 6-Resource Estimates and Issues	Identify high level gaps, concerns and issues	4:00-4:45
Step 7 - Next Steps	Clarify timeline and expectations	4:45-5:00

Map Day Steps

- Introduction and Expectations
- Step 1 - Level 1 Review
- Step 2 - Create Level 2 Map
- Step 3 - Contract Deliverables and Identify Gaps
- Step 4 - Update Level 2 Map
- Step 5 - Define Criteria and Measurement for Deliverables
- Step 6 - Resource Estimates and Issues
- Step 7 - Next Steps/Follow Up

Step 1 - Level 1 Review

- Assign Group roles
- Individually review Level 1 Milestones
- Discuss as a group
- Report out any critical gaps identified
 - Start Risk Register
 - Value management opportunities

Step 2 - Create L2 Map

- Identify all L2 Milestones your Group owns to meet your L1 Milestones
- Write these on the template provided
 - One L1 milestone (with supporting L2s) per page please

Level 2 Milestone Sheet

Level 2 Milestone Identification

Level 1 Milestone:							
L2	Owner	Recipient	Predecessor	Successor	Duration (days)	Date Finished	Assumptions

How to make a Meaningful Post-it

Level (2 or 3)	Due Date
Name of deliverable or milestone (Use at least one verb and one noun)	
Owner Here (Name or Department)	<div data-bbox="936 1049 1463 1248"><p>Red Dot = Reject / Disagree Yellow Dot = Need more information Green Dot = Accept</p></div> <div data-bbox="1493 984 1829 1305"><p>Reserve for Dots</p></div>

Definitions

- Task or Activity:
 - Usually a verb
 - Work in progress
- Deliverable (use for Level 2 and 3 Milestones)
 - Usually a noun; can be with an adjective
 - Is a completed state or activity
 - Can be measured or assessed for quality, schedule, etc.

Step 3 - Contract Deliverables and Identify Gaps

- Assign one person to stay on the floor to respond to questions and inputs from other groups
- Distribute photo copies of L1 milestone evenly among group members
- Each person goes to each (other) group where your team has identified a predecessor or successor
- Check to see if that group has captured that item on their list
 - if yes, place check next to item in left margin
 - if no, add to their sheet with all relevant data
- Continue until all predecessors and successors have been accounted for

Step 4 - Update L2 Map

- All Group members return to your table
- The members discuss
 - if agree with input, update to L1 templates and wall map
 - if disagree, assign individual to go to requesting group and try to resolve
- Place red dot by any that are unresolved by end of exercise

Step 4a – Holes and sanity check

- Identify holes on the Map with sticky dots. A “hole” is a deliverable without an owner or a user.
- Start to identify post-its with yellow dots and see if any of the issues can be resolved.
- Verify that the “critical Issues” are getting the correct level of attention/detail.
- Review the red dot posts it with the various groups so that you are aware of the issues.

Step 5 - Define Criteria and Measurement for Deliverables

- Review any deliverables on the templates for which you are the customer
- Discuss and document, on the template, your criteria for success and how you will measure the quality/completeness of the deliverable
- In certain cases it may be necessary to fully document what exactly are the deliverables and have both managers sign it at a later date.

Step 6 - Resource Estimates

- Once the schedule starts to take shape each Group should stop and review the resources it is going to take to support it.
- Is the work load even?
- Do you have the right skill sets/expertise?
- Logistical issues? (hiring/work permits)

Step 7 - Next Steps

- Review critical issues
- Answer Questions
- Close/Evaluation
- Meeting evaluation

Step 7 - Next Steps

- **Team Commit Dates** (when the team responsible for a sub-deliverable promises to deliver it - a commit date is not the same as an estimate)
- **Quality Criteria** (how we will know if a specific deliverable is done and done well)
- **Validate the Map and Parallel Activities**

Follow up

- When the exercise is complete, a high level 3 schedule should be created.
- Document outcomes and distribute to all participants
- Review Map Day Action Required Items (red-dots)
- If appropriate, reconcile bottoms up and tops down scheduled
 - Teams confirm accuracy of commits
 - Identify and potential parallel tasks or load leveling opportunities to pull in the schedule
 - Project Manager communicated recommended trade off and risk levels to upper management
 - Formalize reconciled commit dates

Benefits

- **Tangible Results:**
 - Better understanding of how the project will be executed
 - People have committed to certain dates
 - All Major Deliverables defined
 - Major issues and risks identified early
 - Everyone should be focused on the project end date
 - A sincere effort to build a schedule from the ground up.

- **In-Tangible Results:**
 - Confidence level in your team
 - Confidence level in the ability to execute the project
 - Team dynamics



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