

Project Planning: The Really Creative & Highly Political First Step



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Summary: The very traits and talents that earn people their promotion to project management positions often prove to be barriers to effective project planning. Poorly done planning leads an otherwise talented PM to project riddled with dissatisfied customers, overruns and lost credibility. We'll look at these barriers and how to surmount them.

You get promoted to a project manager position because you've demonstrated technical savvy and the ability to get things done and solve problems. You have a strong sense of urgency and a keen focus on the task at hand.

Planning the Wrong Way

You have your first planning meeting with executives and managers who are higher ranking than the people with whom you routinely deal and they start talking about the "big picture" which seems real vague to you. Then they ask you technical questions and the capabilities they will have from the project. Relieved to be on familiar ground, you answer at length. Other people ask about features they want to see and you talk some more about how easily those features could be included. Then excited by their interest, you talk some more about the details.

Perhaps you talk a bit too much about the technical detail because people start to yawn and look at their watches. But you needed to show them you knew what you were doing. Finally the big boss claps his hands, looks straight at you and says, "OK, so we'll have the best service in the industry by the end of June, Right?"

Dumbfounded at the question, you nod meekly and everyone gets up and leaves, each of them giving you an empty smile. You have completed your first planning session but it doesn't feel good. At least you can start work.

Months later, after much anger, many accusations, endless change orders for new features and an infinity of overruns, you think back to that planning meeting and realize all your problems started there.

The Activity Trap

The planning scene above is an example of the activity trap. Executives talk in generalities except for the completion date. No one makes any commitment as to exactly what business value the project should produce or what the project should not include. Project managers discuss what they are comfortable talking about; technical details and features. They also often fall prey to the temptation to impress managers with their technical savvy and knowledge.

These PMs think that project planning is just discussing the technical details and features of the project, creating a starting point list of features and requirements. Department managers like it too because they can get work started fast without any commitments that may prove awkward later and limit their flexibility. What this leads to is projects with horrendous scope creep because all people talk about is the next few additions they'll add to the "to do" list.

The project's scope and budget expand wildly as tasks are added because they sound like they should be part of the effort or they are a great idea. The thousands of decisions that people make during a project are not channeled toward a clear, measured result. The project manager doesn't find out about the desired strategic result until the project is finished and the stakeholders are unhappy with the deliverables.

It's no surprise that most bad projects -- particularly the ones that organizations repeat every few years -- are flawed because the front end planning is weak or was never attempted. It's up to the project manager to get the real definition of success before the project starts.

The PM must ask tough questions of the project sponsor and stakeholders: How will you measure success at the end of this project? What do you really want to buy for all this money we're going to spend? Getting answers to these questions forces the kind of conceptual thinking required at the front end of a project. Without an understanding of the desired result, the PM cannot fend off scope enlargement or define success for the people who will be doing the work. With answers to these strategic questions, the PM can drive the project toward the agreed upon measures of success. But the really hard part is that the goal can't be vague "mission statement mush"; it has to be an objectively measurable acceptance criteria. Getting that kind of precise scope definition takes some time and good project managers always make the investment because it pays off.

A Different Kind of Thinking

Defining project success requires strategic thinking where you encourage the sponsor and stakeholders to reach beyond the first thing they want the project team to do and "see" the end result they want and then "see" alternative paths for reaching it. We need to conceive a project as a sequence of deliverables; each defined as a measured business achievement not an activity. We create this sequence by starting at the end of the project -- yes, the end.

The last achievement is the sponsor's definition of success. This success definition needs to be a measurable and quantified business outcome.

"Provide the best possible customer service" is neither. It sounds good and no one will disagree, but it's mush. We can't measure whether or not we have achieved it and, as a result, cannot control the scope.

"Answer 95% of our customers' calls within 120 seconds" is measurable and quantified.

People will argue about whether or not this is what they want and that's the point. We want to have those debates now, not in the middle of the project. And the PM is not in the debate about setting the quantified outcome; that is the sponsor's job. The PM's job is to subtly make sure the sponsor does their job.

After a sponsor "sets" this measurable definition of success we will not have to argue about whether or not we succeeded.

The Reluctant Sponsor: The Politics Come In

The experienced PM realizes that it's foolish to start a project until the sponsor has defined success in measurable terms. Some sponsors resist providing this definition of success. Doing so requires that they commit to exactly what they want and this is politically risky for them. Getting a clear definition of success also requires that they reconcile the conflicting desires of various stakeholders in the project. While this process is difficult, it's far easier to handle these conflicts before you start work than to have them plague you and your project team for the entire duration of the project.

In sum, completing the front end planning of a project is no easy task. It usually involves pressing people who outrank you to make difficult conceptual decisions. It requires that you engage in "blue sky" thinking and that you help resolve the conflicts between project sponsors and stakeholders. But the benefits are substantial. You can control project scope by asking the question, "How does this new task you want to add help us reach our measure of success?" You can give your project team crystal clear expectations about what they have to achieve. Finally, you do not have to argue about what people really want during the project or, even worse, at the end.

Summary

All the techniques in this article are part of our [Achievement-driven Project Methodology](#) (AdPM™) which we teach in [individual one-on-one training](#) over the Internet as well as in-person [seminars for organizations](#).