

Assignment Work Packages Foundation for Top Team Performance



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Summary: All project managers want greater clarity on assignments, more team member commitment and better estimating. But too many ignore the humble work package for project team assignments.

You're too busy, way too busy, to waste time on work packages for each team member's assignment. That's just needless paperwork and you want to keep things lean and mean. Besides, these comments your team members make are just normal complaining, not signs of problems to come:

One day before the task due date:

"Ohhhh, now I understand what you really wanted."

Two days after starting an assignment:

"The people on that previous task did the wrong thing. Should I redo it for them or do you want them to start over?"

During planning:

"I really can't tell you how long this will take. How about I just call you when I'm done?"

When turning in a "completed" assignment:

"I had no idea you wanted documentation too!"

When reporting a duration overrun:

"It's taking longer than you planned but my boss and I have added some really great "state of the art" stuff that people will love."

More Detail and Micro-management Doesn't Work

Hearing remarks like these drives many project managers to build project plans and work breakdown structures with endless details. The hope is that if the work breakdown structure contains every "to do list" item that people might forget, we won't hear those spine-chilling, schedule-busting comments. But a micro-management approach yields project plans and work breakdown structures that are so big no one reads them, much less understands them. This is true on the first day of the project and gets worse as we progress because it is impossible to keep these monsters up to date. That's because maintaining that level of detail accurately requires so much time that we just don't do it. Micro-managing also fosters a "to do list"

mentality in team members. They feel responsible only for completing the list of tasks, not delivering the end result the project needs.

Even with these details, we continue to have people who don't understand their assignments, can't make an accurate estimate and feel no obligation to exercise any scope control on their assignment. The PM then supplements the massive project plan with daily cubicle hopping to check on the progress and holds mindless status meetings to hunt for problems. But there is a better alternative. The work package:

Work Packages to the Rescue

Team Member Work Package: Estimating, Risk & Process Controls			
WBS Number:			
Measured Achievement			
Responsibility of:			
Accountable to:			
Date Approved:			
Availability for the assignment			
Approach Statement:			
Input Deliverable(s):			
Output Deliverable(s):			
Risk issues:	<i>Pessimistic Factors</i>	<i>Optimistic Factors</i>	
Assumptions:			
Documentation & developmental checkpoints			
Work (hours/days):	<i>Pessimistic</i>	<i>Best Guess</i>	<i>Optimistic</i>
	<i>Hrs</i>	<i>Hrs</i>	<i>Hrs</i>
Estimated Duration:			
Cost:			
Change Control			
Actual hours/duration			

Work Packages to the Rescue

Adding assignment work packages to your planning and tracking process is a simple and time efficient process that pays dividends far in excess of the amount of effort it requires. Work packages allow a project manager to develop smaller and more achievement oriented work breakdown structures and still have a better level of control over assignments than PMs get from a monstrous project plan.

Using work packages also helps us control one very large source of scope creep; namely our own project team. Poorly defined assignments are an invitation for team members to “fall in love with the assignment” and add features, information and functionality never contemplated by the project’s sponsors or the project manager.

Work packages come in many forms and it’s easy to get carried away with too much sophisticated detail in the beginning. It’s a far better process to start with a simple work package that is one page or less when we introduce it to our project team members. We can always get more sophisticated later. The elements we should include in the work package are:

- **ID info** – first, we identify the project, the team member and the achievement the team member will be accountable for delivering (not the activities they will perform). Then we get into the meat of the work package, remembering that the whole document should not be more than one side of one piece of paper.
- **Approach statement** - here the project manager and team member jointly discuss and make notes on the approach the team member will take to the task. This is very situation-specific but the project manager may suggest ways to avoid certain political issues amongst the people the team member will have to deal with. Or they may discuss the technical approach that the team member’s to take. What we’re getting at here is a big picture of the strategy the team members should take. With more senior members of the project team, the team member may be in a far better position to specify the approach to the deliverable and the project manager is merely indicating his acceptance of the approach.
- **Input and output deliverables** - the project manager and team member discuss the deliverables from previous tasks which the team member needs to start work on this one. We write down the inputs the team member needs and identify the tasks and the people responsible for delivering them. Likewise, the project manager and team member will explicitly identify and describe the outputs the team member will create in addition to the primary deliverable from this task. Examples of these outputs might include documentation of the design, calculations or supporting information that the team member gathered. All of these outputs require work and we want to reach agreement on them now so that the estimates the team member will make at the end of the work package process reflect all the work that has to be done.
- **Team member time commitment**-the project manager and team member discuss the kind of work effort the task will require. As an example if there are approvals to be secured from various departments, each of which will take review time, then the team member may not be able to work 100% of the time even if they are available. The project manager and team member identify the pattern of work commitments and then the project manager secures that time from the team member’s organizational superior. It is

a good practice to have that superior sign the team members work package, agreeing to the time commitment and to the output deliverables and the estimate.

- **Risk assessment**-the project manager and team member go through a process of identifying two kinds of risks. First they identify two or three bad risks that could cause the task to take more time and more work. These bad risks might include lack of cooperation from user departments or delays from vendors who are notorious for late deliveries. The project manager and team member also discuss one or two good risks that could cause the tasks to take less time and work. This is very valuable information for the project manager who can take steps to mitigate the bad risks and encourage the good risks.
- **Estimates**-using the above information the team member and project manager discuss the estimate. The work package approach we have talked about is set up for three point or PERT estimates. Or, the project manager and team member may simply agree on a work estimate and a duration estimate that takes into account the team member's time availability.

As noted above, the information on the work package should not take up more than one side of one piece of paper and for most tasks the meeting should not require more than 10 or 15 minutes for a small task.

The best way to complete the work package is to make it a joint effort between the team member and the project manager. It is after all, the foundation for gaining their commitment. In circumstances where we're doing our plan before we know the identity of the person who'll be given the assignment, we'll complete the work package form ourselves. When that person's identity becomes known we'll meet with the individual to review and finalize it.

The work package is something the team member will maintain for the life of the assignment. It serves as the team member's supporting documentation for defining variances and overruns. Finally, we archive them with actual work and time noted so that we can refer to them the next time to help us on a new project.

Summary

Using work packages as a foundation for estimating and controlling scope lets project managers build smaller and more flexible work breakdown structures while actually improving the scope control process.