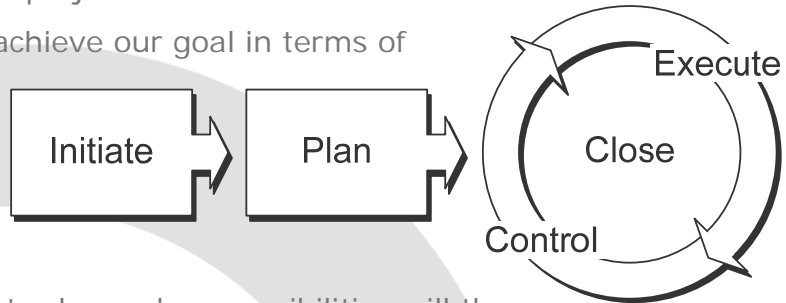


Project Planning Guide

Initiation Considerations

- ❑ **Goal** – What results will this project deliver?
- ❑ **Objectives** – How will we achieve our goal in terms of strategy, approach, or deliverables?
- ❑ **Stakeholders** – Who are the stakeholders? Are they committed to success? What roles and responsibilities will they each have?
- ❑ **Assumptions** – List the assumptions by stakeholder group and consider how they could impact project success.
- ❑ **Triple Constraints** – Identify the stakeholder's driving constraints; understand any flexibility in time, resources, or outcomes.
- ❑ **Commitment** – Assess your organization's and your stakeholder's commitment to project success.



Projects don't fail at the end, they fail at the beginning. The earlier you invest in project success, the greater your return on invested time will be.

Planning Step-by-Step

1. **Create the work breakdown structure** (work summaries, milestones, tasks, and constraining dates; build buy-in with a collaborative approach)
2. **Create a task chart** (Tasks, Durations, Predecessors, Resources, Costs)
3. **Estimate durations** with your normal resource loading
4. **Model workflow** dependencies (seek clarity and realistic dynamics)
5. **Create a "normal" C.P.M. schedule** (a safe, simple, likely to succeed Gantt or Activity-on-Node chart with critical path, slack, and resource requirements)
6. **Level resources** and adjust schedule if necessary (manage scarcity carefully)
7. **Adjust the plan** to strategically balance time, costs, outcomes, and risk
8. **Distribute a baseline plan** (with buy-in and single-point responsibilities listed)

Planning with MS Project

1. **Enter the WBS** into the Table: Entry (Gantt Chart view). Use Work Summaries (indent subtasks with the green arrow icons) and related Milestones (set duration to zero) at the same indent as their Summary Tasks.
2. **Estimate task durations** using the best available data while assuming (at this stage of planning) that appropriate resources will be available.
3. **Model workflow dependencies** by entering predecessor relationships into the Predecessor column of Task Entry Table (or Task Information box, or Task Form in a combination view). Insert constraints MSO, MFO, ALAP, FNET, FNLT, SNLT, or SNET on Milestones, Work Summaries, or Tasks as required.
4. **Enter resource requirements** using the Assign Resources dialog box or by entering data into the Resource column. When reentering or adjusting resources, confirm that Duration, Resources, and Work meets your expectations. Effort Driven scheduling is default, but may be turned off for all new tasks in the Options → Scheduling Tab → New Tasks are Effort Driven radio button, or individually in the Task Form or Task Information dialog box.
5. **Set the Schedule From → Start Date** or **Finish Date** in the Project → Project Information box and enter the project's expected start or finish date.
6. **Check the project's critical path**, available slack, resource requirements and adjust resources, workflow, WBS, or approach if necessary. Use the Detailed Gantt Chart View with a Resource Usage Sheet or Task Usage Sheet.
7. **Set a Baseline Plan** at Tools → Tracking → Save Baseline and distribute.

MS Project Cautions

- **Don't enter**, paste, or edit dates in the Table: Entry **Start** or **Finish** columns — doing so prevents ASAP task scheduling by creating arbitrary date constraints.
- **Undo doesn't** (MS Project 2003 and earlier) — save frequently.
- **Beware of accidental constraints.** If a constraint icon appears in the Indicator Column, make sure it is one you've manually set. Remove unwanted constraints by selecting the tasks to modify, click Project → Task Information → Advanced, set Constraint Type to As Soon As Possible; and clear the Constraint Date.

