

# Planning – the bedrock of Project Controls

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## Planning – How to Succeed

**Hints and Tips from Real Life Experience.**

**October 2012**

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*With grateful thanks and acknowledgements to all those colleagues I have worked with, both within BAE Systems, the APM SIGS & Branches, Planning Planet and Guild, and elsewhere who have shown me the light, highlighted alternatives or just challenged the status quo and way of doing things – thank you.*

# Agenda

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- Some Initial Thoughts
- Why Bother
- Planning – How is it Done?
- Integrated Planning – Project Control
- What is this Planning thing really about
- It's all about Dates isn't it?
- So what is Planning really about?
- Planning Structure
- Understand the Industry
- Requirements
- Assumptions
- Basic Understanding
- Delivery Responsibility
- Let's Get Started
- A few shouldn'ts
- Planning – Status
- Who Owns the Plan?
- Think Laterally
- Keep the Faith
- Belief and Passion
- Any Questions.

## Some Initial Thoughts:

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***“Planning is an unnatural process. It is much more satisfying to do something, and the nicest thing about not planning is that failure comes as a complete surprise rather than being preceded by a long period of worry and depression”***

*...John Harvey-Jones.*

***A plan should be treated like a map -  
It is showing the way, so don't concentrate on what has gone,  
Focus on the future and how to get there!***

***“Use project management software as a tool –  
Not as a substitute for effective planning or interpersonal skills.”***

*...Harold Kerzner.*

***“There is no doubt that there is a definite correlation between  
inadequate project planning,  
..... at the outset and subsequent project failure.”***

*.... Richard Trim*

## Why bother?

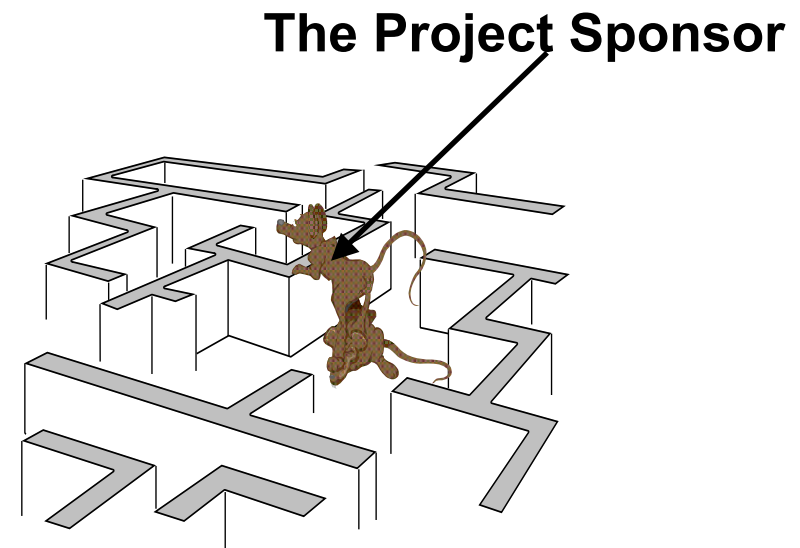
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**28%** abandoned before project completion

**46%** are behind schedule or over budget

Source: Gartner Group Report on major corporate systems investments.

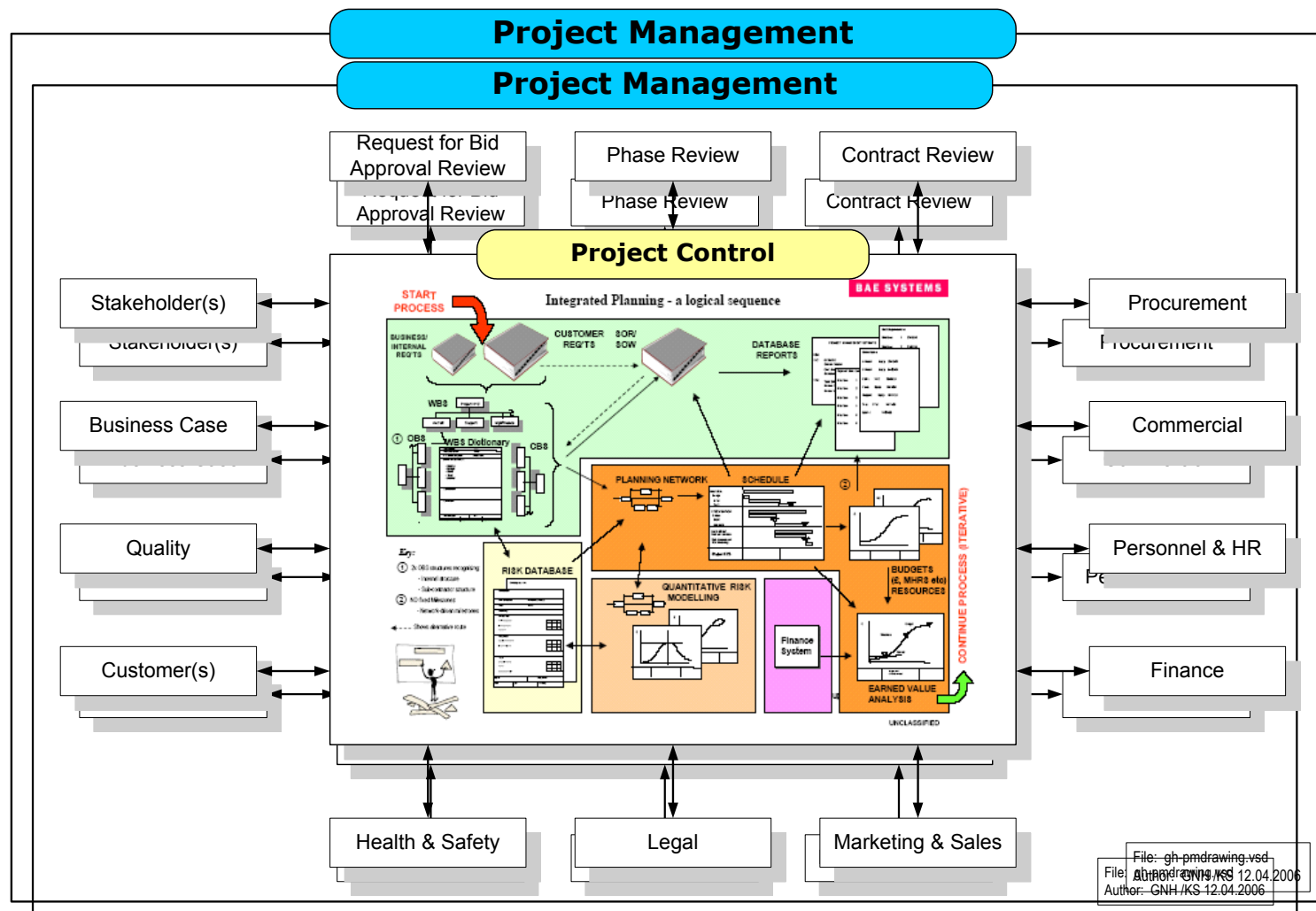
# Planning – How is it done?



Unfortunately it's not magic

It's a dynamic event that evolves over time

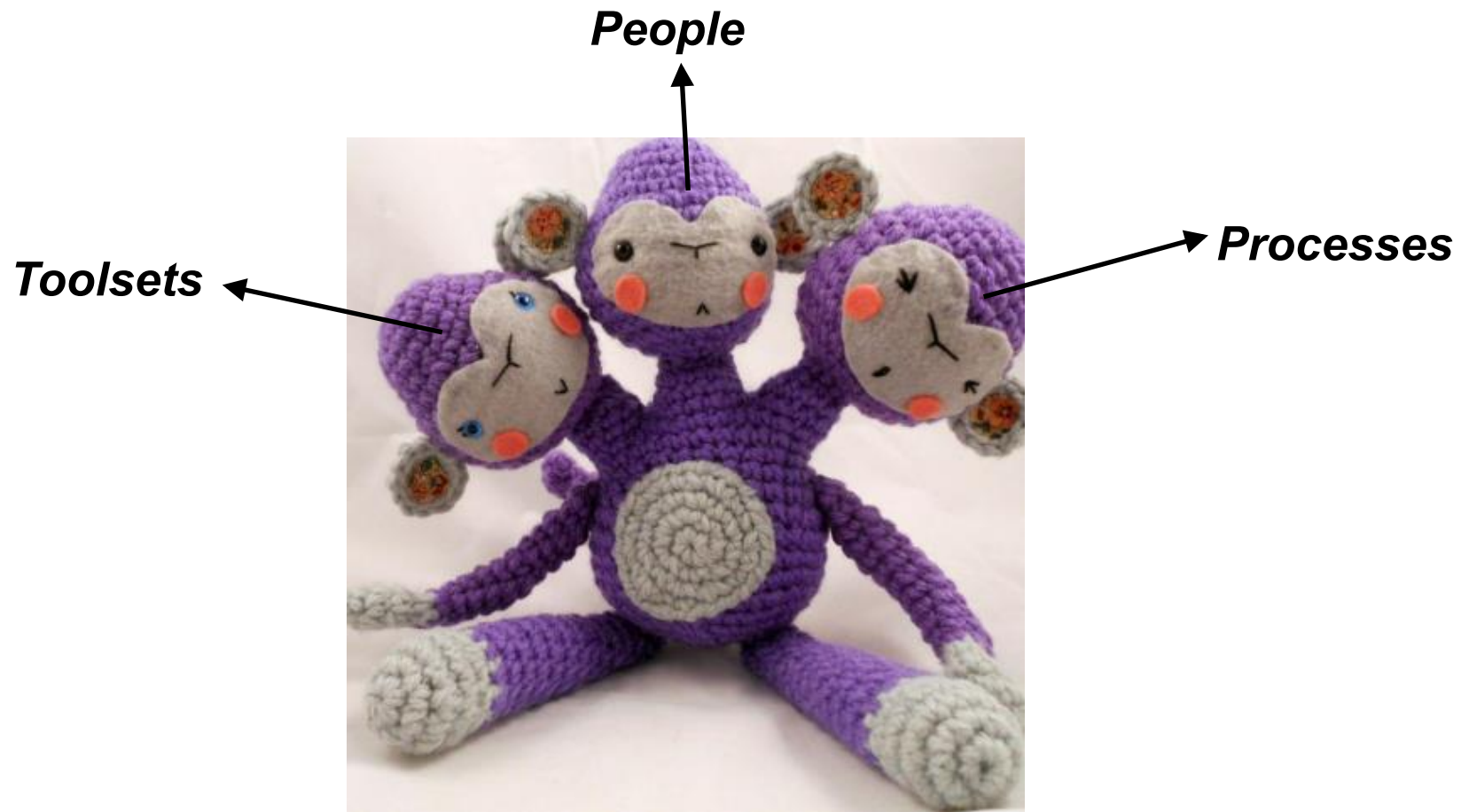
# Integrated Planning – Project Control





# What is this Planning thing really all about?

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# It's all about Dates isn't it?

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*Proactive*

*A Good Communicator*

*Logical*

*A Natural Curiosity*

*Rapport*

*Patience*

*Facilitator*

*An Eye for detail*

*Seeing the big picture*

*Determined, but not stubborn*

*Structured – seeking order*

*Clarity of thought*

*Thirst for understanding*

*Honesty*

***BUT - It's not about Dates though.***

***Dates are the Outcome of Good Planning***

# So Really what is Planning about?

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**Build a Rapport.**

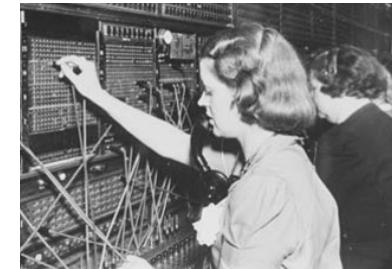
**Communication**

**Establish strong personal connections**

**Establish & Find Common ground** – it may not even be work related. Interests, hobbies, schools, college, university, holidays.

**Focus on understanding predecessors**

**Others will define your successors** – if they need them.



**Engagement**

**Empathy**



## Planning - Structure

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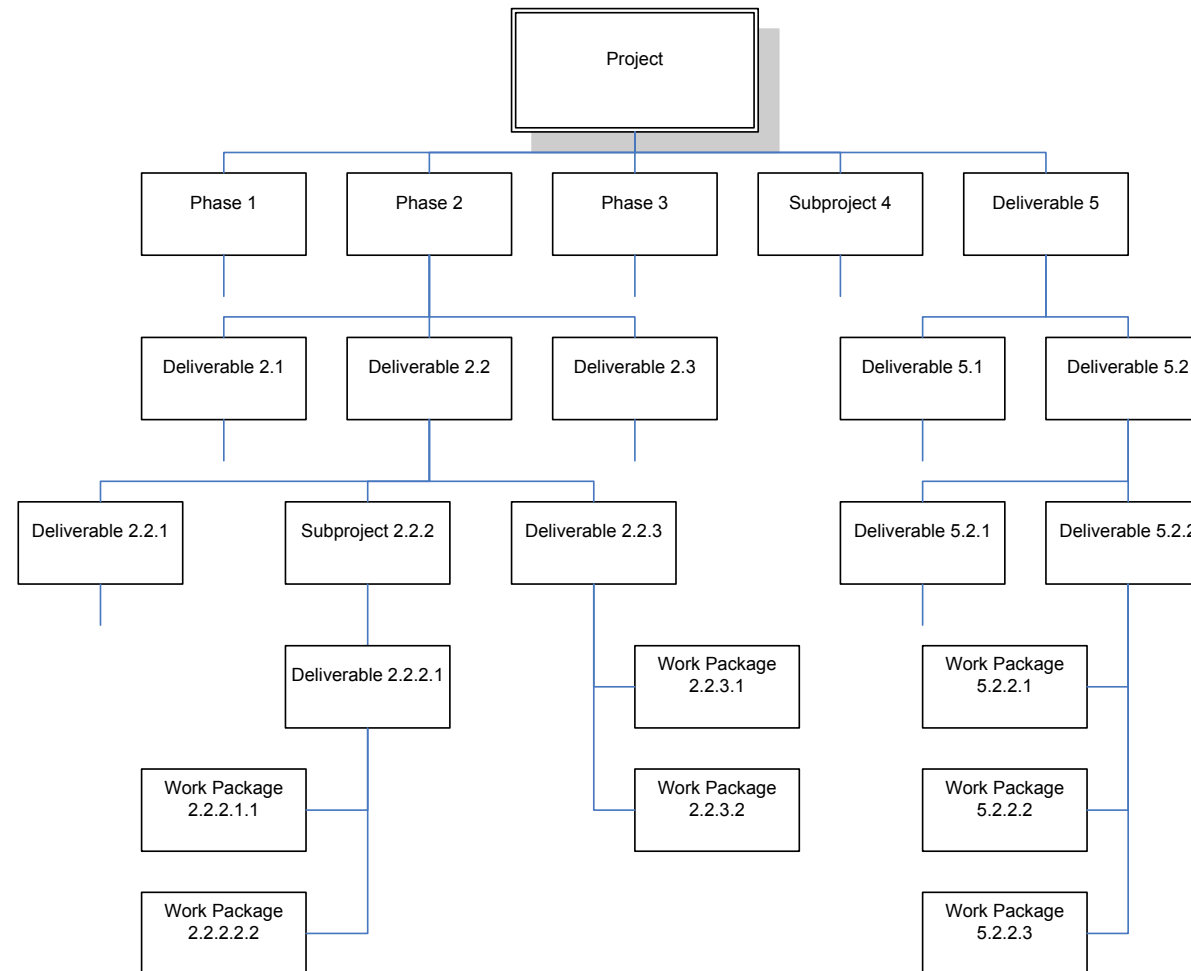
How do you eat an elephant?

In Chunks



# Planning - Structure

Build a WBS.



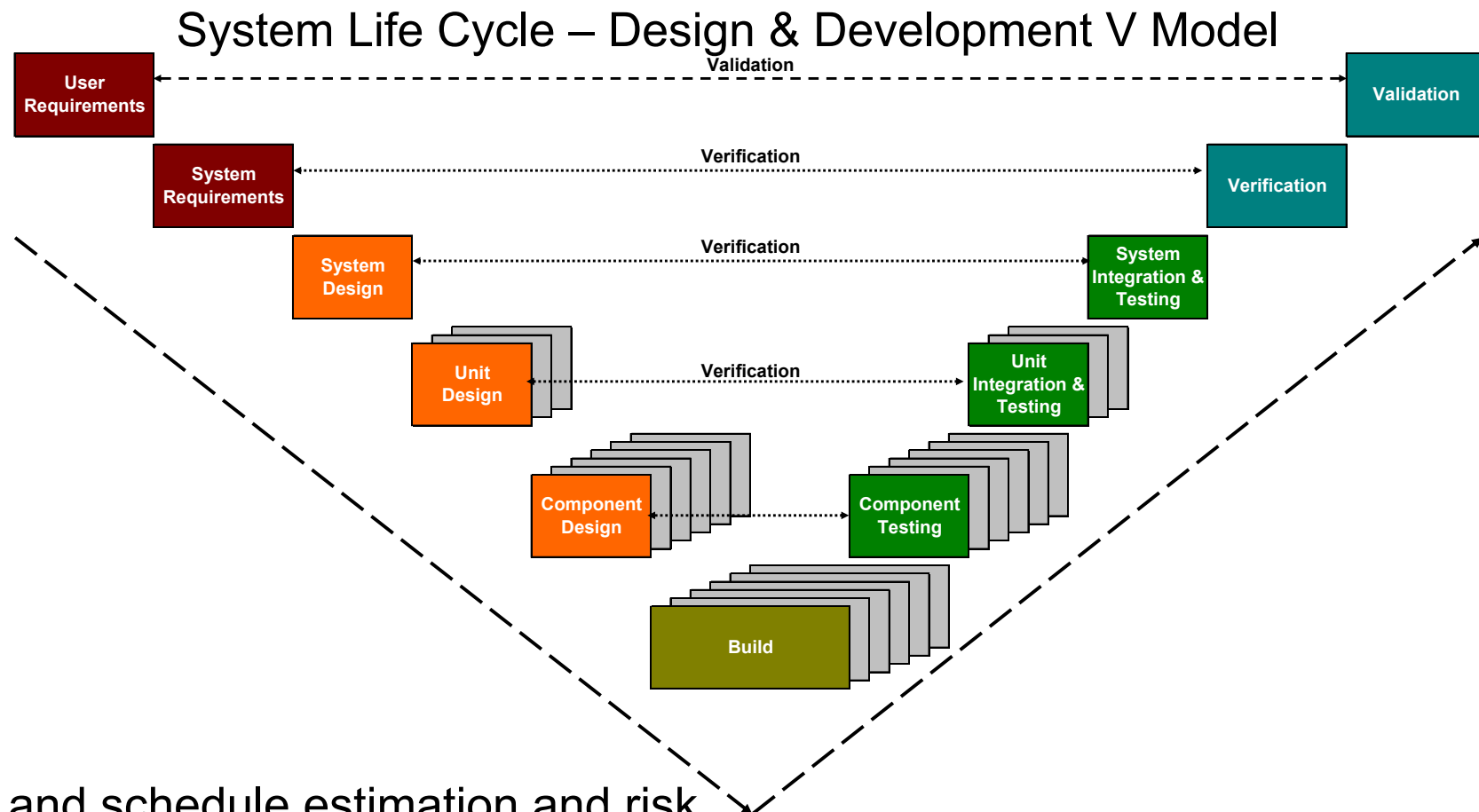
# Clarity of the Work content

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## Sample Work Breakdown dictionary:

WBS Number:		
Work Breakdown Element Title:		
Work Breakdown Element Description:		
Constituent Tasks:		
Dependencies:		
<b>Key Deliverables:</b>		
Assumptions:		
WBE Manager:		
Issue:	Date:	Authorised:

# Understand the Industry



Cost and schedule estimation and risk management processes inconsistently aligned with systems engineering processes. DOD 2006

# Understand and get behind the real need.

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What did the Customer really want?

As Requested



As Defined



As Designed



As Developed



As Manufactured



User Wanted





# Requirements

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**Specify your requirements clearly: “a bed for the night”  
is met by this offering, but did you really mean at this standard?**





**What do we mean? How is it understood?  
Where does your audience come from?**

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# PCB?

**Establish a common understanding**

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# Planning Assumptions



Are we all on the  
same hymn sheet?

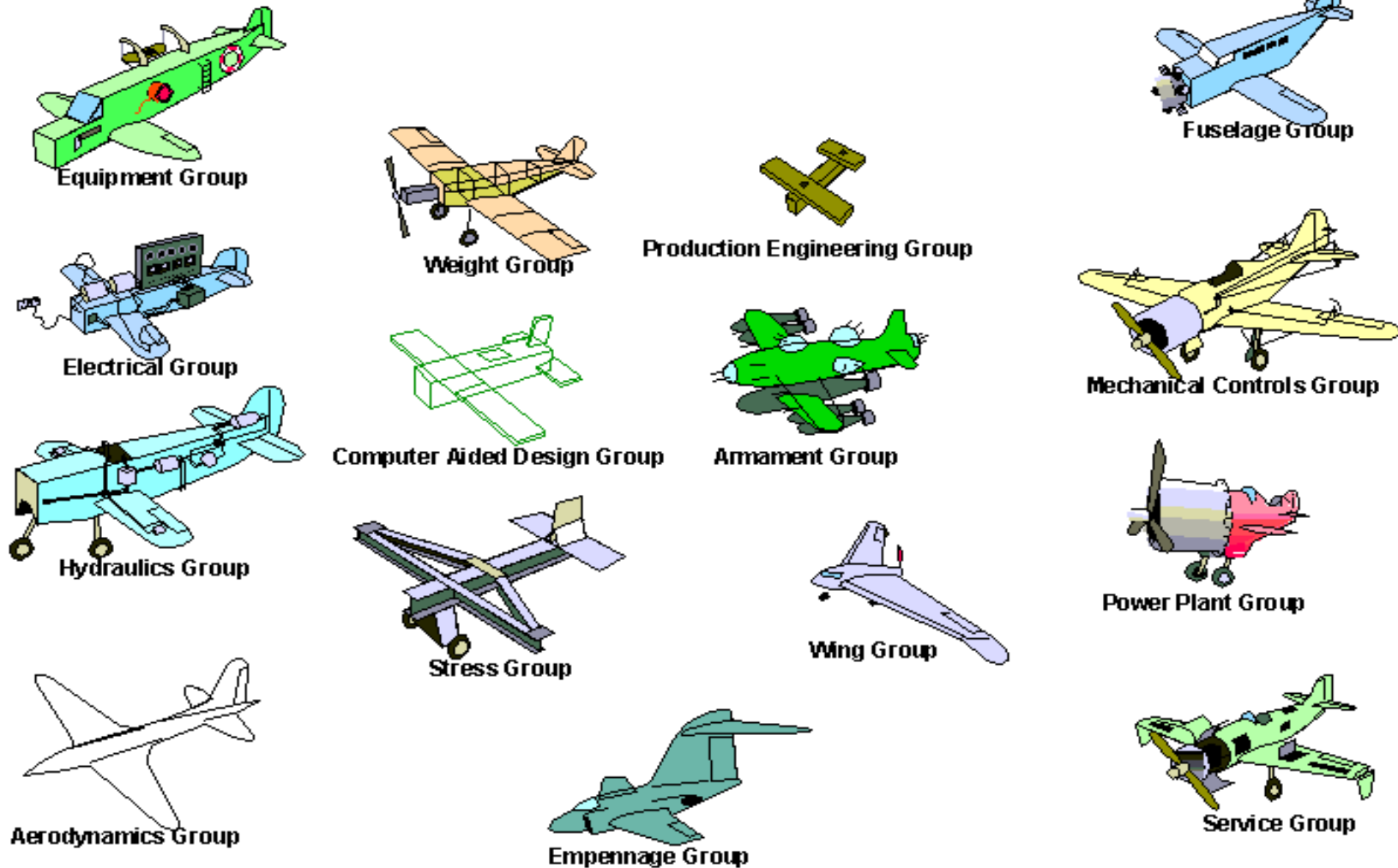
Which Carol?

Which tune?

Which words?



# Different Assumptions can lead to different solutions.



## Basic Understanding.

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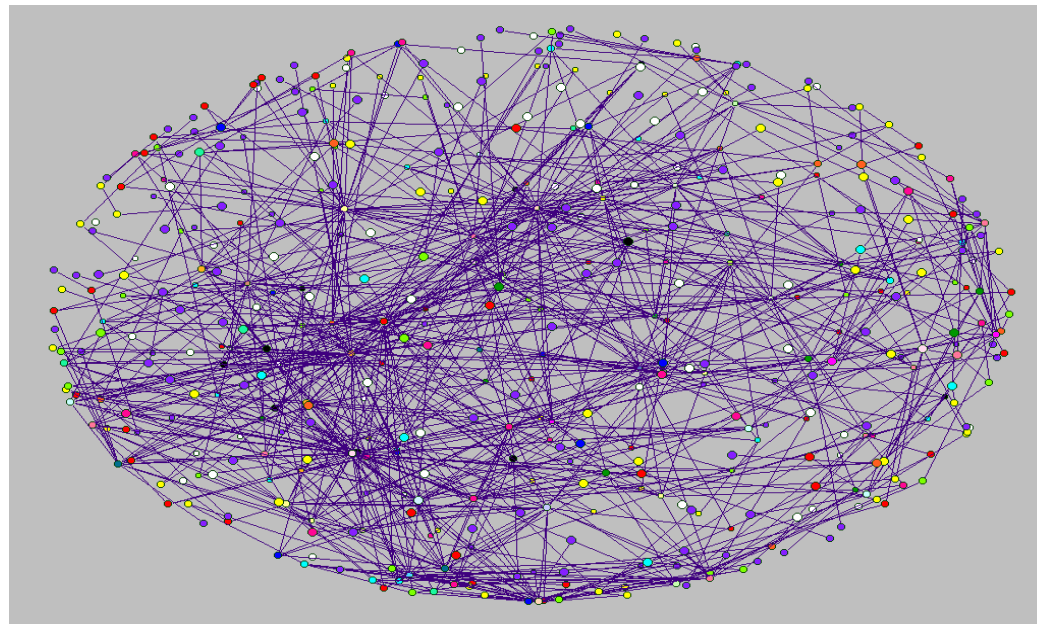
The Real world is full of many interactions.

Have a desire to understand how things fit and work together

Understand the differences between want and need

Get out there. Understand what makes things tick.

All work should have a purpose. It should meet a need.



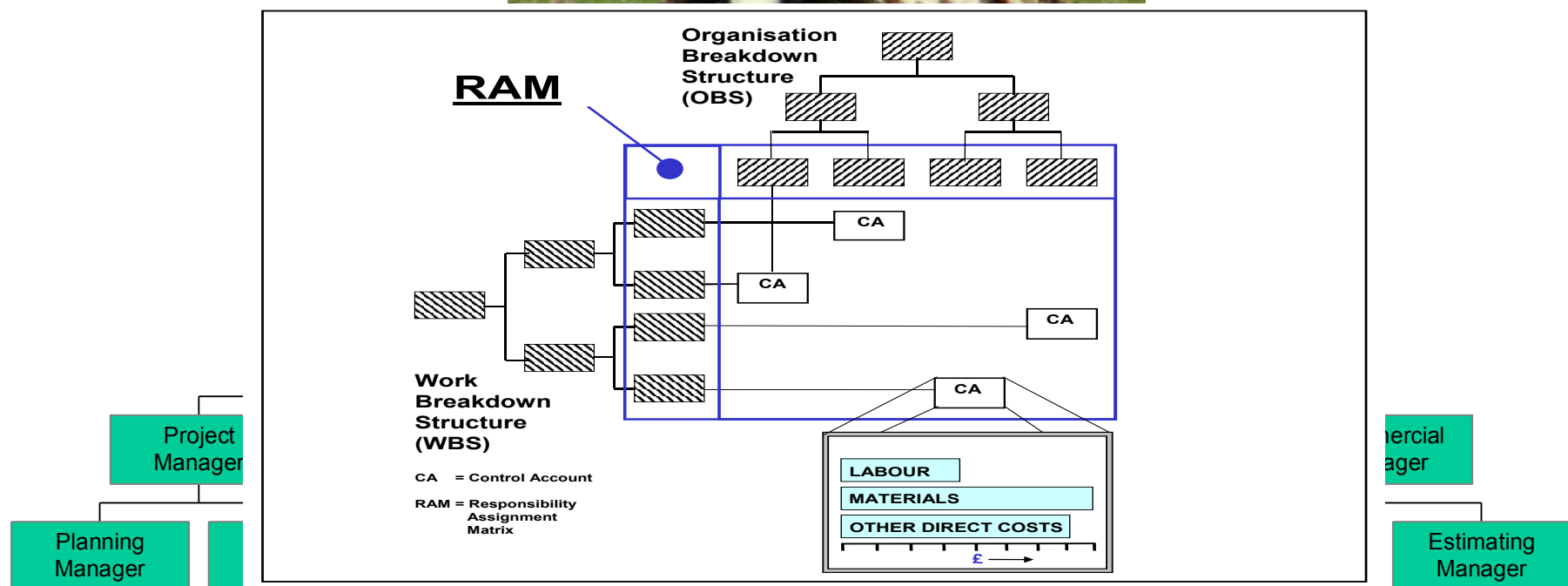
# Delivery Responsibility

Understand the delivery responsibilities

Understand who actually delivers the work

Ensure all work – WBS is covered by the organisation – OBS.

Build a Responsibility Assignment Matrix - RAM





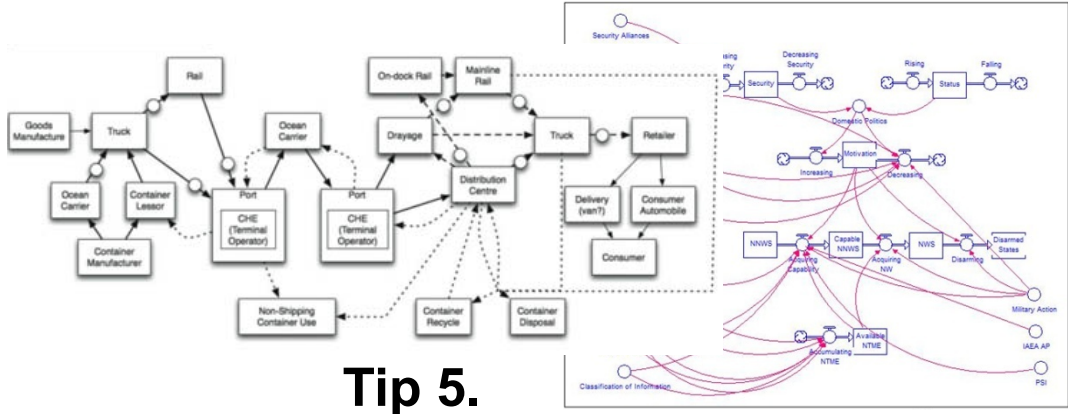
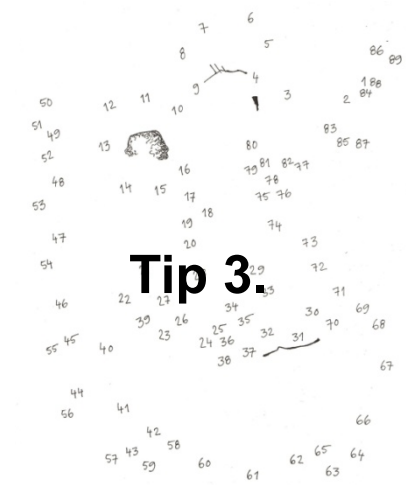
# What do you Require?

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## What do you Require on Your Project?



# Let's Get started



**Enquiring mind - a systematic or is it a systems approach?**



# All joined Up

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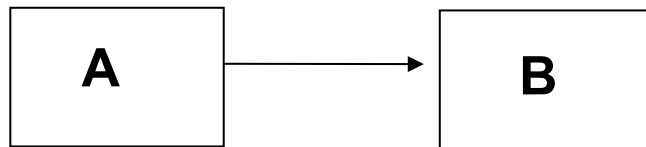
**In a Good network everything links together**

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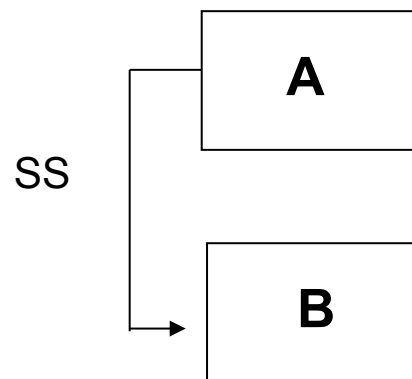


# Logic – what is it?

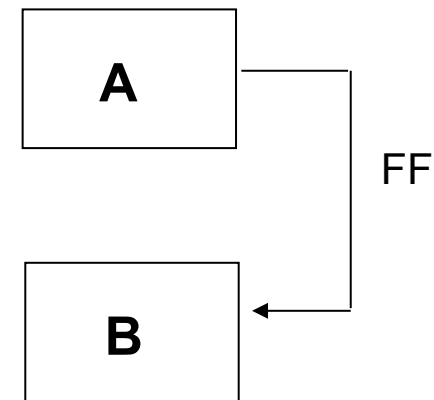
Finish to Start:



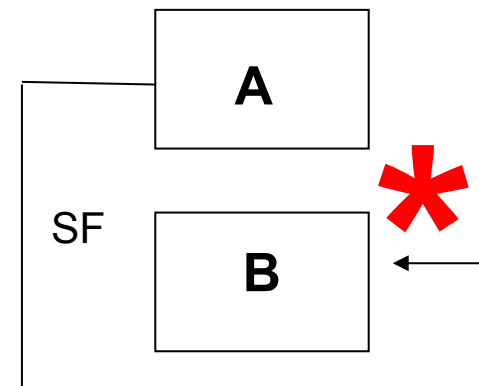
Start to Start:



Finish to Finish:



Start to Finish:

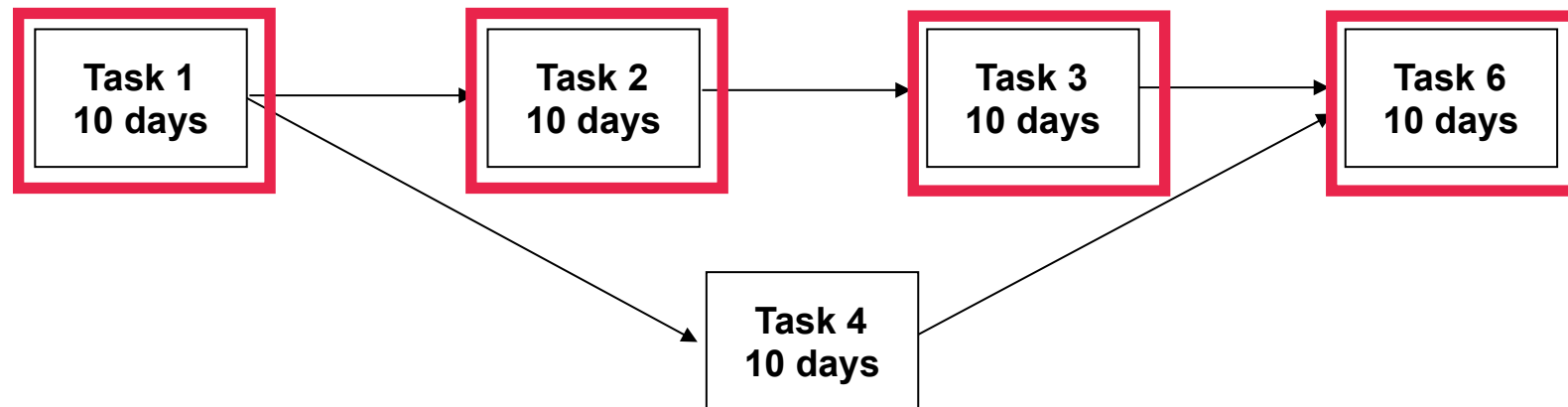


Only a Really  
Special type of  
person uses this  
relationship

**Don't be a  
Plonker!**

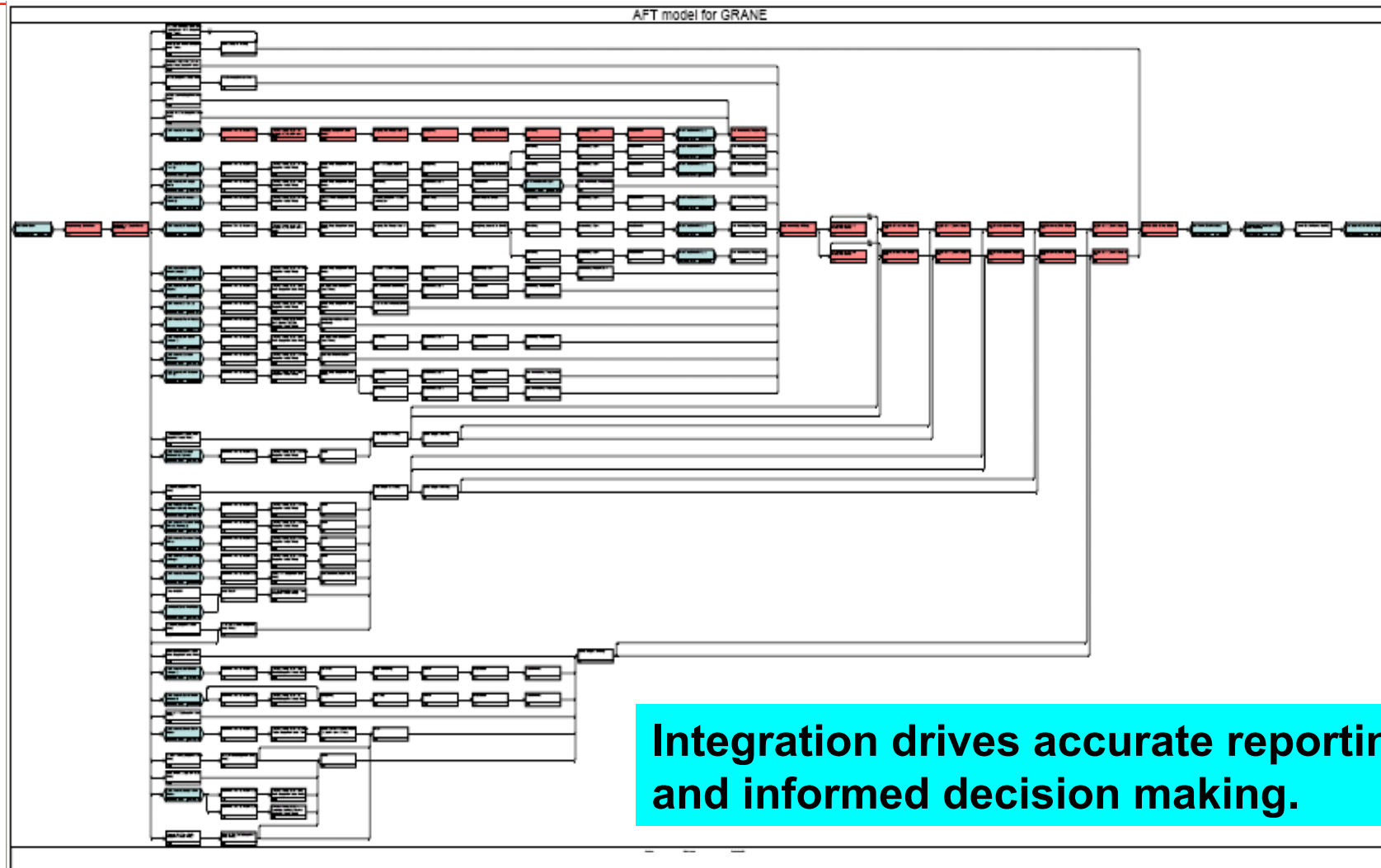
# Basic Understanding.

Identify the critical path.



Innate knowledge of critical path - have a “gut” feel. 100 % accuracy not necessarily required.

## As we Aspire to



## A few shouldn'ts



## A few more shouldn'ts

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Negative delays – don't have. It only indicates you have not understood the real logic and planned at the correct level of detail.

Linking to Summary tasks to real activities is also a “No-No”.



Negative  
Float

Negative Float: Don't have Negative Float. It only indicates that the plan is flawed and unattainable

**No Dangles** - Every activity has a Predecessor and Successor  
Unless a start point or a delivery milestone. Joined Up Logic please!

## Planning - Status

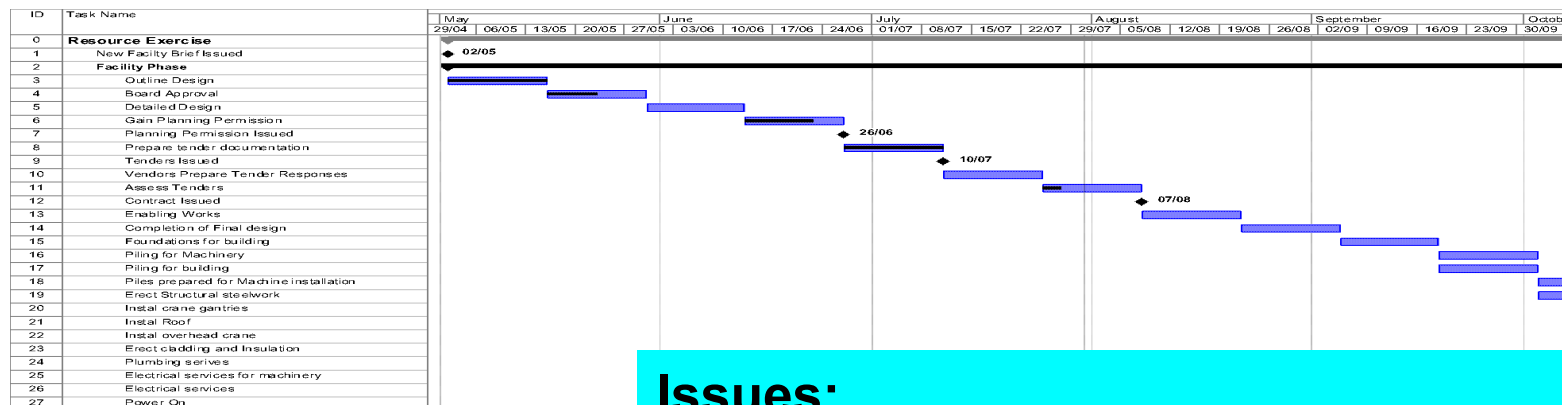
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**No Surprises. Be Forewarned. Plan Ahead. Be Prepared**

# Planning Status

What does this schedule tell you about the health of the Project?  
Same schedule. One version is base-lined, one is not.



ID	Task Name	Duration
0	Resource Exercise	170 days
1	New Facility Brief Issued	0 days
2	Facility Phase	170 days
3	Outline Design	10 days
4	Board Approval	10 days
5	Detailed Design	10 days
6	Gain Planning Permission	10 days
7	Planning Permission Issued	0 days
8	Prepare tender documentation	10 days
9	Tenders Issued	0 days
10	Vendors Prepare Tender Responses	14 days
11	Assess Tenders	10 days
12	Contract Issued	0 days
13	Enabling Works	10 days
14	Completion of Final design	10 days
15	Foundations for building	10 days
16	Piling for Machinery	10 days
17	Piling for building	10 days
18	Piles prepared for Machine installation	10 days
19	Erect Structural steelwork	10 days
20	Install crane gantries	10 days
21	Install Roof	10 days
22	Install overhead crane	10 days
23	Erect cladding and Insulation	10 days
24	Plumbing services	10 days
25	Electrical services for machinery	10 days
26	Electrical services	10 days
27	Power On	10 days
28	Commission Facility	10 days
29	Facility available for use	0 days

## Issues:

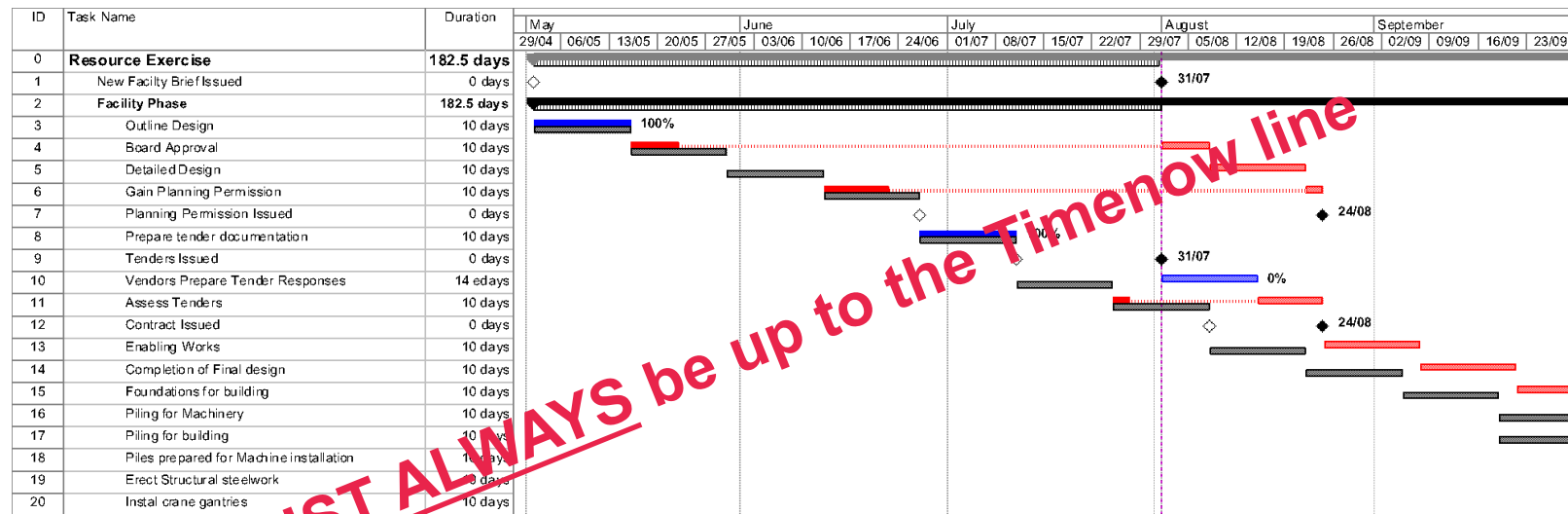
- Where is Timenow? (Status Date)
- Activities in the past not complete?
- Activities in the future complete?
- Activities completed “out of Sequence”?

# Planning Status

Status MUST ALWAYS be up to the Timenow Line (Status Date)

What does this view of the barchart tell us about the state of the Schedule?

Great benefits when you compare with the baseline.





# Who Owns the Plan?

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**Build “Our Plan”.**

**Build the “team’s” plan.**



**The team will endeavour to deliver  
“their” plan, not “your” plan.**

## Planning – Reasoning and Logic.

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# Never Argue with an Idiot

**Bystanders may have trouble working out who is who!  
You don't want to ruin your reputation.  
The idiot will want to enhance theirs.**

# The “Devils” in the detail

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- The smallest details count.
- The details need to be correct.
- The logic needs to be complete - no gaps in the logic.
- Is there one part of the project / programme that is problematical?
- Be prepared to Analyse the next level down. It may provide a different story



## People – Yes involve them.

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Over 70% of Customers  
buying decisions are based  
on positive human interactions  
with sales staff.

The bottom line is that people  
buy from people, not companies.



## Real Planners Talk to Real People

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# Lateral Thinking



Look at things from all angles



Think –

“that’s good how can I apply it at work?”



Look at things from all angles

Colleagues in other industries



Look for similar things from the past.  
Lessons learnt or lessons applied.



# Integrated Planning – the Ultimate Aim?

ID	PAN	Task Name	LOT No	Duration	Min Dur	Likely Dur	Max Dur	3rd Quarter	1st Quarter	3rd Quarter	1st Quarter
1		PMR Model Schedules		229 days?	0 days	0 days	0 days	Jul	Sep	Nov	Jan
2								Jul	Sep	Nov	Jan
3		Generate Purchase Order		50 days	0 days	50 days	0 days	Jul	Sep	Nov	Jan
4	3	Purchase Order Issued		0 days	0 days	0 days	0 days	Jul	Sep	Nov	Jan
5	4	Machine Build (Generate Assets)		50 days	0 days	50 days	0 days	Jul	Sep	Nov	Jan
6		Installation		50 days	0 days	50 days	0 days	Jul	Sep	Nov	Jan
7	6	IAT complete		0 days	0 days	0 days	0 days	Jul	Sep	Nov	Jan
8	7	Productionisation		50 days	0 days	50 days	0 days	Jul	Sep	Nov	Jan
9	8	Asset xxx Available to Production		0 days	0 days	0 days	0 days	Jul	Sep	Nov	Jan
10		F35 Programme Rpt Date	LOT 4	0 days	0 days	0 days	0 days	Jul	Sep	Nov	Jan

Import Activities & 3 Point Durations

**Deterministic Model**  
Define uncertainty ranges

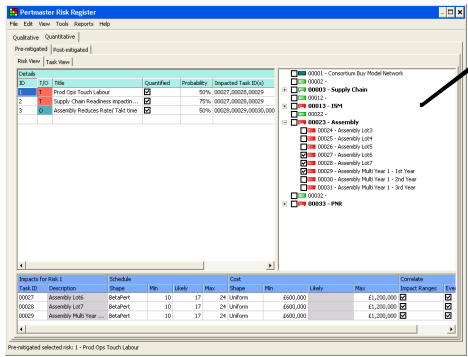
Import Risk Log

**Probabilistic/ SRA Model**

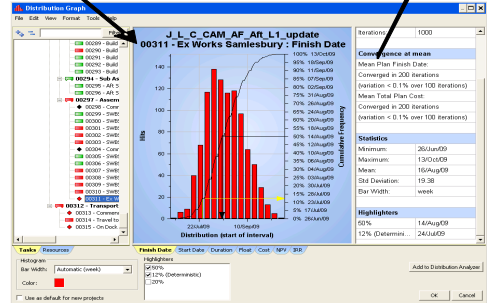
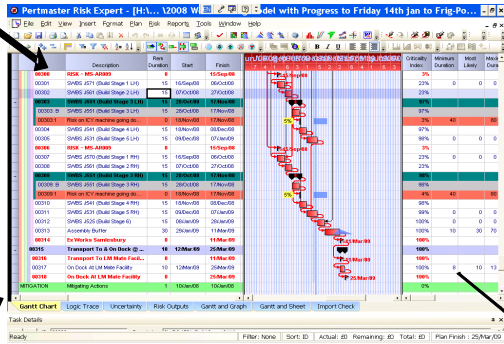
**Involve People**  
**Talk to People**

**Results studied**  
**and analysed.**  
**Data used to inform**  
**and amend and**  
**DELIVER**

SRA Model Run  
Results Generated



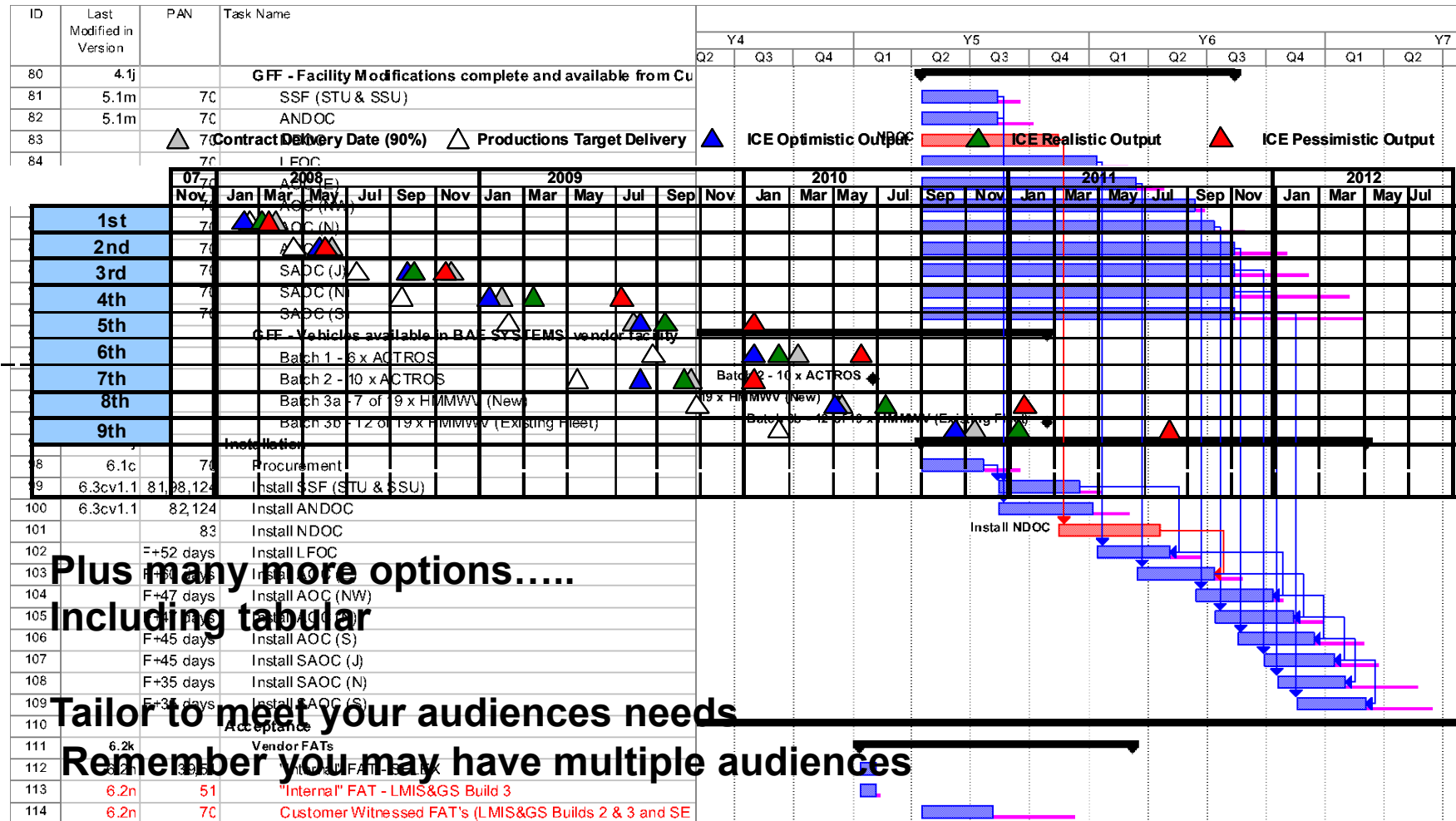
**Define Threats & Opportunities**  
**Risks Captured,**



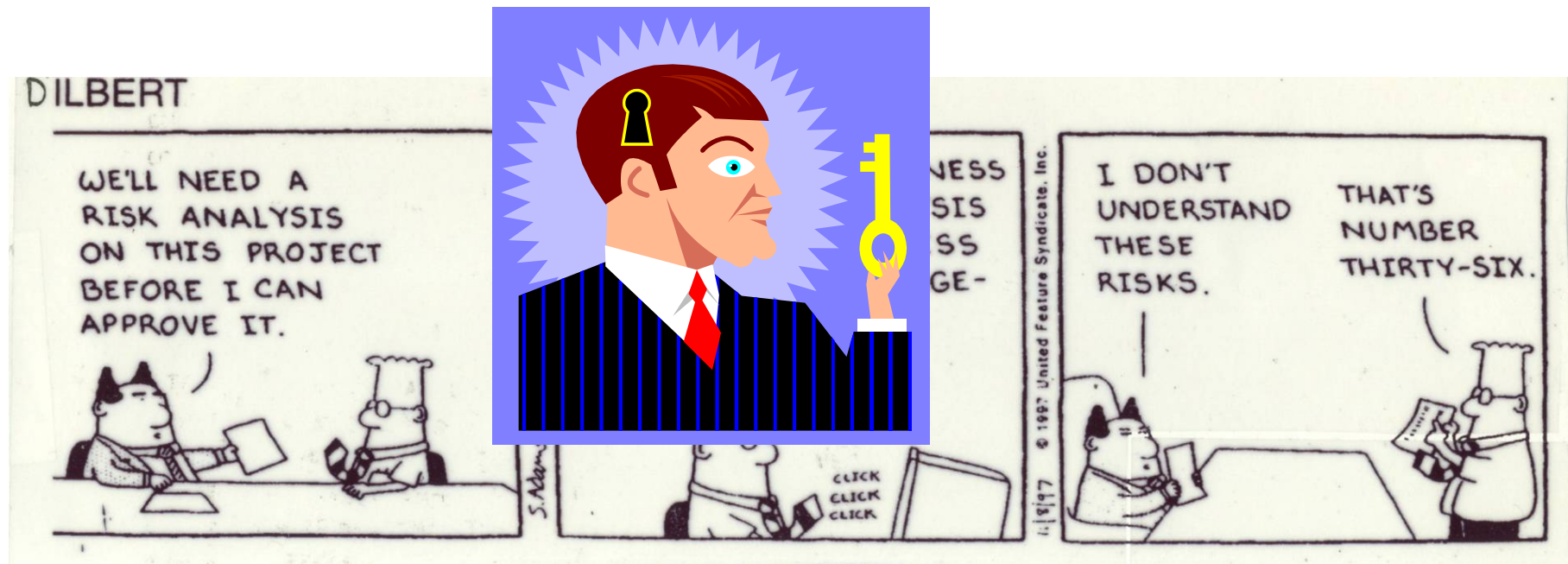
**SRA Results/ Confidence Levels**  
**At 20/50/80% for key milestones**



# Think Laterally - Get Engagement – Consider Your Audience



## Attitudes of Mind:



Risk number 103.... "Just make the end date equal July"

Is this really a risk, or just confirmation that we are planning to fail?



## Keep the Faith

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- Join the other Planners of the world.
  - Take time to attend professional body events
  - Swop stories and experiences
  - Have that interest in your discipline.
  - It might be **sad** but invest your own time and energies to take your skills in your favoured discipline forward. Yes – undertake Professional Development.
  - Don' t be afraid to lead...  
.....however just be aware others may plagiarize your work. When you find out just take it as a complement! Just remember you were leading.
  - Maybe true planners are altruistic in nature?
- 
- Knowledge has a half live of 7 years – continual need for CPD.



# Belief and Passion

- Always believe in the power of the GOOD sound robust planning.
- Trust yourself.
- When senior managers state that the business does not need high calibre planning or risk analysis continue to believe – keep the faith...
- The business may not Want, but it most certainly **NEEDS** those skills and traits.
- ***“Planning is still not seen as a core capability”*** Human Systems, 2012.



# Don't miss the train

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Be Realistic in your Aspirations

Impossible Dates:

Don't Demoralise the team

Don't Fail the Customers

Don't Fail Yourself

Don't Plan to Fail



So why do we do it?

And do it again?

And Keep doing it again?

Stupid Eh?

# Remember, Remember.... It's all Teamwork

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**BAE SYSTEMS**



***It's just like a performance. We all have a part to play.  
All parts must fit together as a coherent whole.***

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# Conclusion

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- Planning is about scope, structure, purpose, objectives
  - Planning is about integration to achieve deliverables
  - Planning is about the identification and management of interdependencies
  - Planning is about clarity of organisation and organisational responsibility
  - Planning is about getting agreement with all stakeholders
  - Planning is forward looking/ pre-emptive
  - Planning is done for the overall business benefit it can generate
  - Dates are one of the resultant outcomes of good planning
  - Planning is all about Effective Communication
- 
- **Real Planning is not about Dates**

# Don't Forget your own Perception & Prejudices.

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**Which presenter would you have turned up to listen to?**

- Involve all relevant sources of information
- Put you own personal prejudices to one side
- Involve All, Value All, Thank All.



**Recommendations on LinkedIn appreciated if you have found this presentation beneficial – thank you**



## Planning

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# ANY QUESTIONS?





## One Final Thought

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Planning is there to add  
Value and bring Benefit.

