

# *Napkin Project Definition and Napkin Project Planning*

**A Seminar Sponsored Jointly by:**

**Advanced Strategies, Inc.**

**Atlanta, GA**

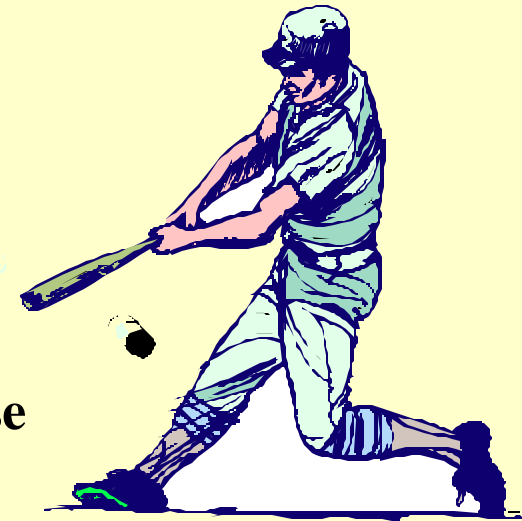


# Statistics of IT Projects

- **28% of IT Application Development Projects are canceled before completion\***
- **Another 46% are “challenged” by cost/time overruns or changes in scope\***

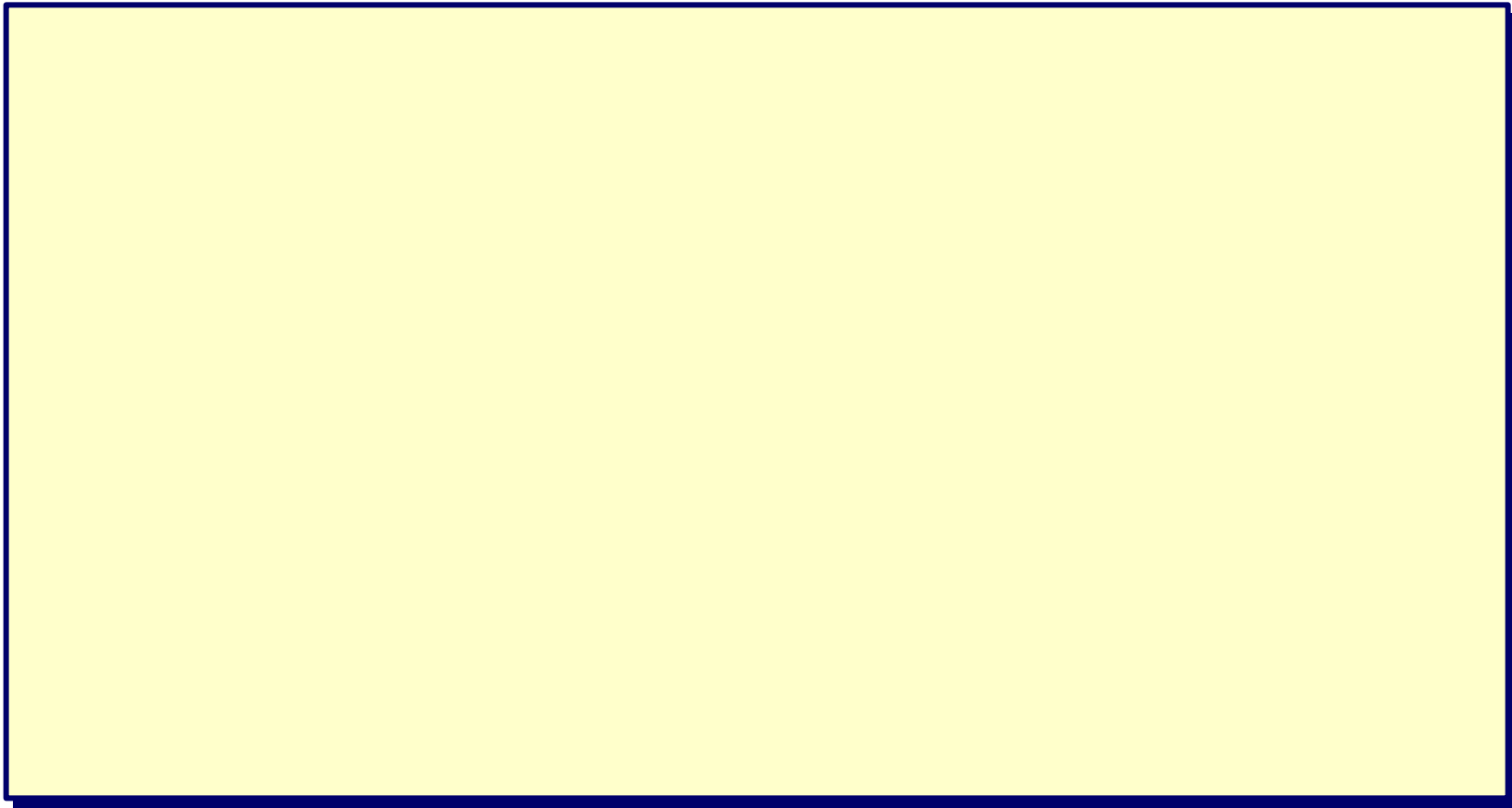
**“Only in baseball do we reward these kinds of statistics”**

**Ken Brame, former-CIO, Service Merchandise**



**\* The Standish Group International, Inc.’s 1998 study “Chaos Report”**

# Why Projects Fail - Your Experience



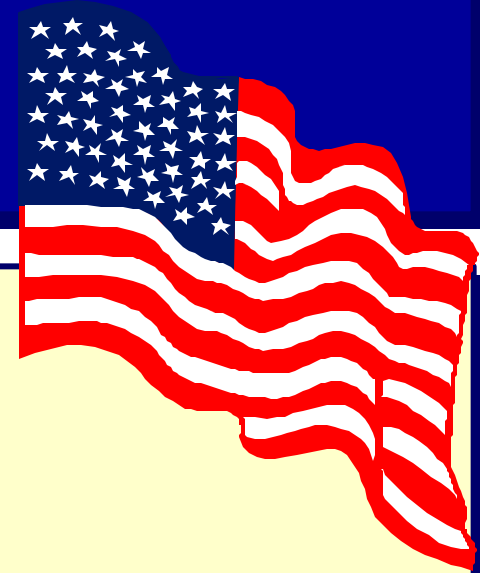
# Seminar Intentions

**At the conclusion of the seminar, you will be able to apply a technique to :**

**Increase your probability of attaining project success, by enabling you to better:**

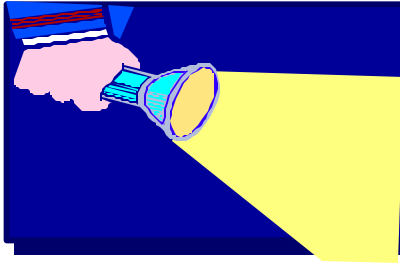
- ★ Understand what is needed by the business**
- ★ Focus the effort**
- ★ Plan and oversee the effort**
- ★ Prioritize between projects**

# Seminar Values



**We believe in:**

- ★ **Learning vs. Turning**
- ★ **Emphasizing Content Over Style**
- ★ **Providing Take-Aways that You can Implement Immediately**
- ★ **Having Fun**



## Seminar Focus

**During the Seminar We will Focus on:**

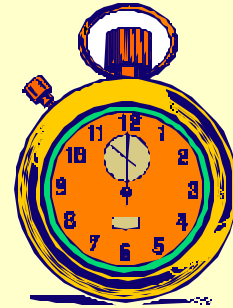
- ★ **All Minimal Elements of a Project Definition and Project Plan in Enough Detail to**
  - **Understand Meaning**
  - **Begin to Use**
  
- ★ **All types of Projects**
  - **With an emphasis on small-medium IT Projects**

# Seminar Context

**In Planning and Conducting the Seminar, We are Mindful of the:**

**★ Time Constraints:**

- One Day



**★ Known Obstacles including:**

- Attendees from Widely Differing Backgrounds



# Seminar Plan



#	Activity	Schedule	Resource
1	Welcome / Introductions	9:00 – 9:30	Ed
2	Project Management Overview	9:30 – 10:00	Ed
3	Napkin Project Definition	10:00 – 11:45	Ed
4	Napkin Project Planning	1:00 – 3:30	Richard
5	Conclusions and Q/A	3:30 – 4:00	Ed and Richard

# Administrative Items

## Need a Break?

- ★ Squirm, lay down, ..., or tell me!!!

**If something's not clear, if you have a question, or if I say something stupid and I am not making sense...**

- ★ Frown, scowl, or stop me!!!



# Keys to this Session

## Biggest Complaints from Past Sessions:

- ★ There were no handouts
- ★ The presentation didn't follow the brochure description
- ★ At the end, I didn't have a sense of what the key message was
- ★ It didn't provide me with the information I need to move forward: resources, contacts, action steps



# Keys to this Session

## Addressing the biggest Complaints from Past Sessions:

- ★ Handouts have been... handed out.
- ★ Key points from the brochure description are posted and will be our guide.
- ★ At the end of each section and at the end of the presentation, key message will be reviewed.
- ★ Information to move forward is presented:
  - Independently
  - With Advanced Strategies

# Today's Project Environment

Today's (IT) Professional should:

**“Demonstrate the ability and inclination to...**

**‘...tolerate chaos, ambiguity, and lack of knowledge, and to function effectively in spite of them.’\***



**\* Position description for Senior Analyst/Designer at a major software company.**

# Project Management Overview

# **Role of the Project Manager/Leader in this Environment - The Good News**

**Plan, organize, control, and lead:**

- **a team of individuals**
- **in the production of a specified set of deliverables**
- **in the achievement of a specified set of goals**
- **within a definite period of time**
- **achieving a quality level acceptable to the beneficiaries and other stakeholders**
- **in spite of a scarcity of resources**
- **in spite of an assortment of constraints including the absence of formal authority**

# Role of the Project Manager/Leader in this Environment - *Reality*

**Plan, organize, control, and lead**

- **a team of individuals**

**(not all of whom are of your choosing)**

- **in the production of a specified set of deliverables**

**(not completely known at the time)**

- **in the achievement of a specified set of goals**

**(also not completely known at the time)**

- **within a definite period of time**

**(often less than what is needed, and often shifting)**

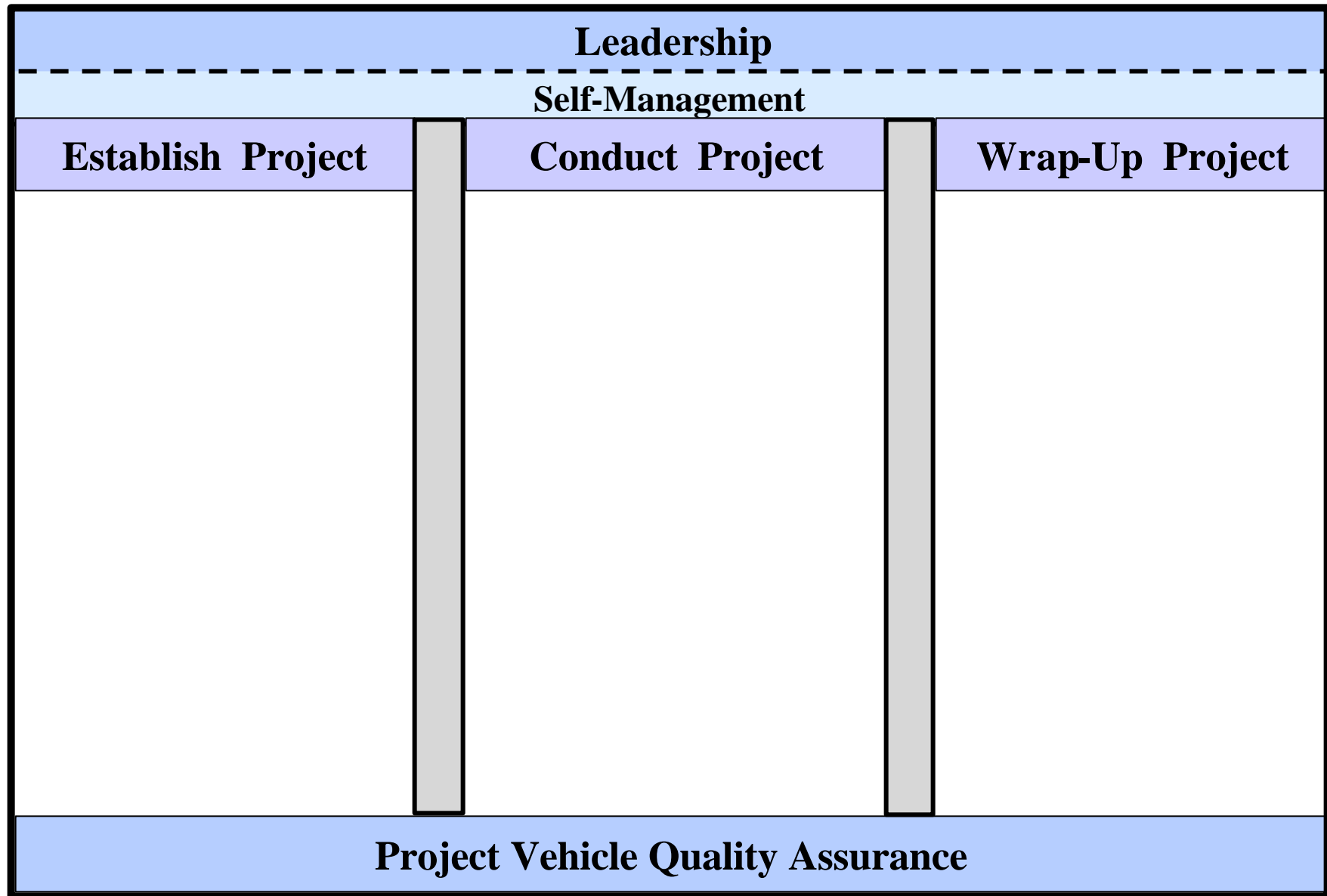
# **Role of the Project Manager/Leader in this Environment - *Reality***

- **achieving a quality level acceptable to the beneficiaries and other stakeholders**  
**(who don't always know what they want;  
who may lose interest in the effort or priorities may shift due to the urgency of other projects;  
and whose interests may conflict with each other)**
- **in spite of a scarcity of resources**  
**(which are not necessarily under one's control)**
- **in spite of an assortment of constraints including the absence of formal authority**

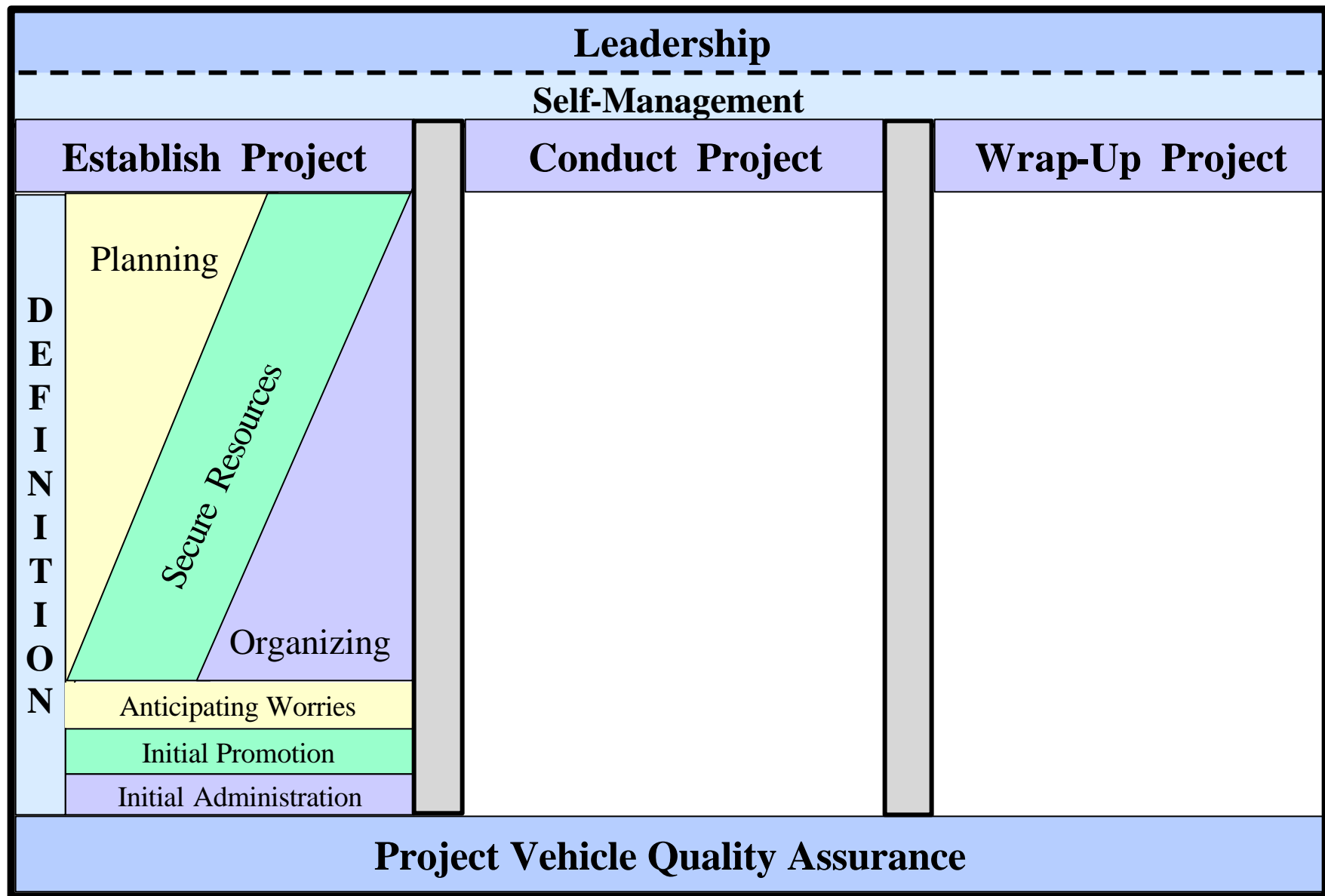
# What Constitutes a Project?

- **A specified set of deliverables**
- **A definite time span**
- **The marshalling of resources including one or more individuals (and other resources)**
  
- **This includes:**
  - **Formal IT development projects**
  - **Non-IT projects**
  - **Day to day activities**
  - **Non-work projects**

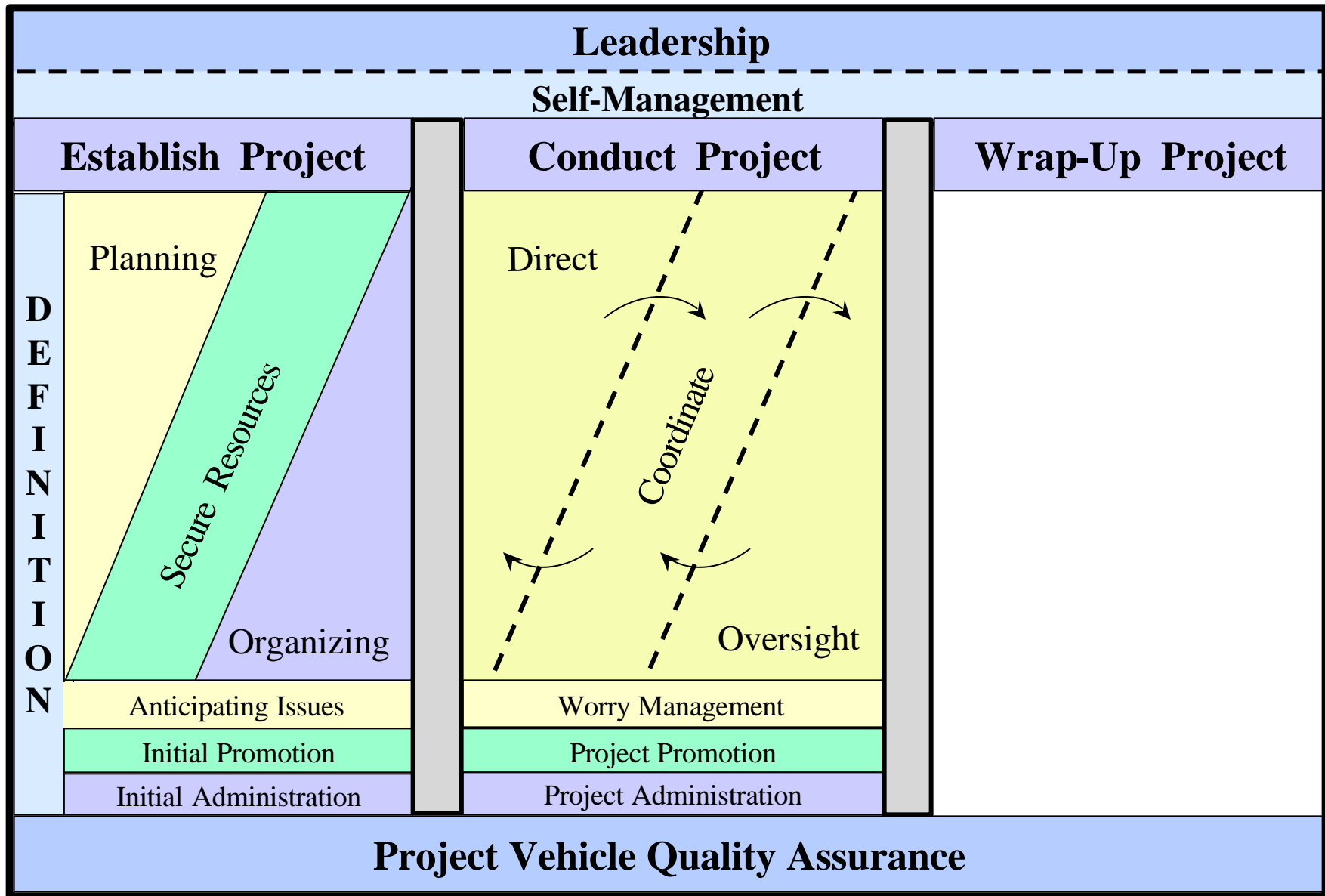
# Aspects of Project Management -- Vehicle



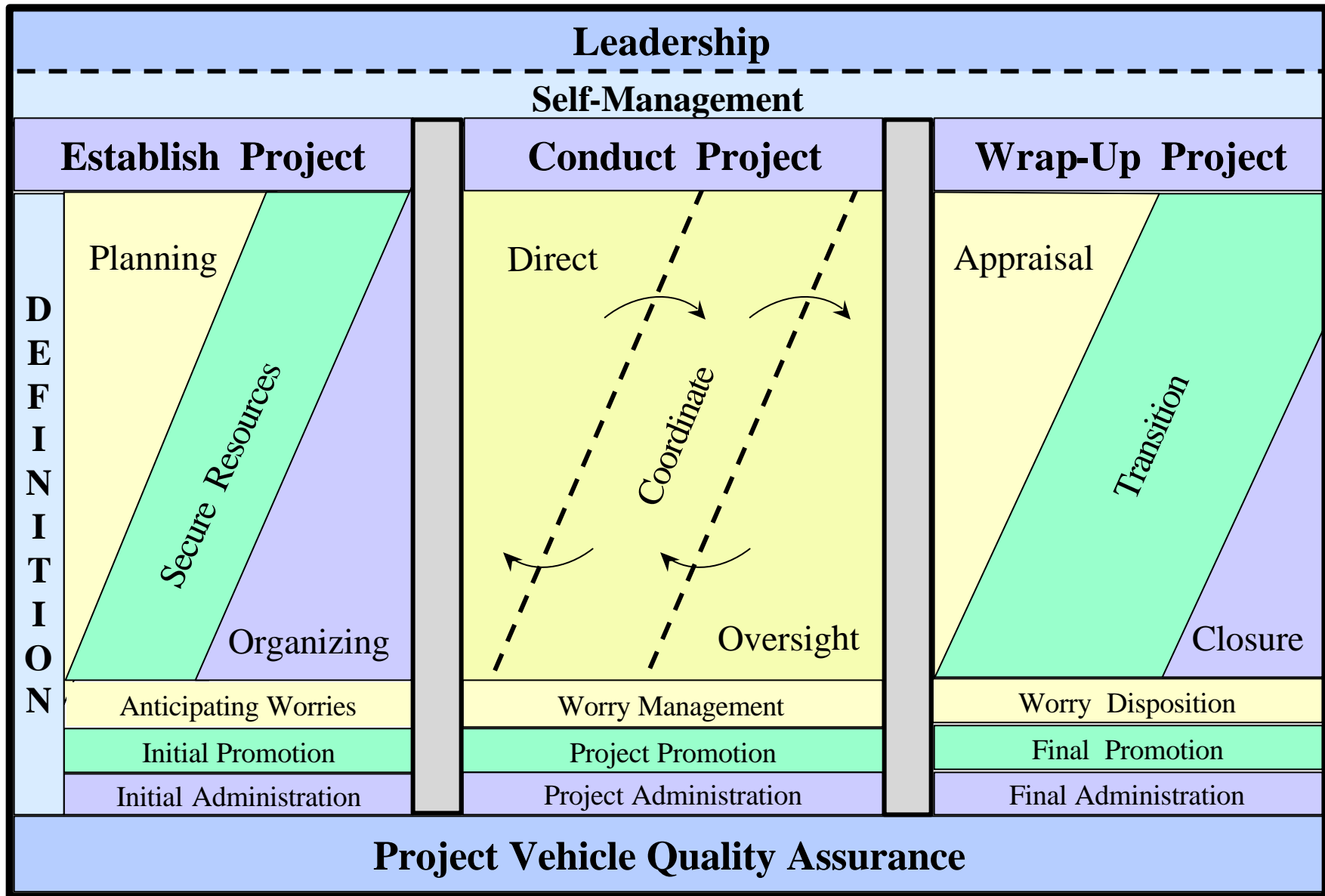
# Aspects of Project Management -- Vehicle



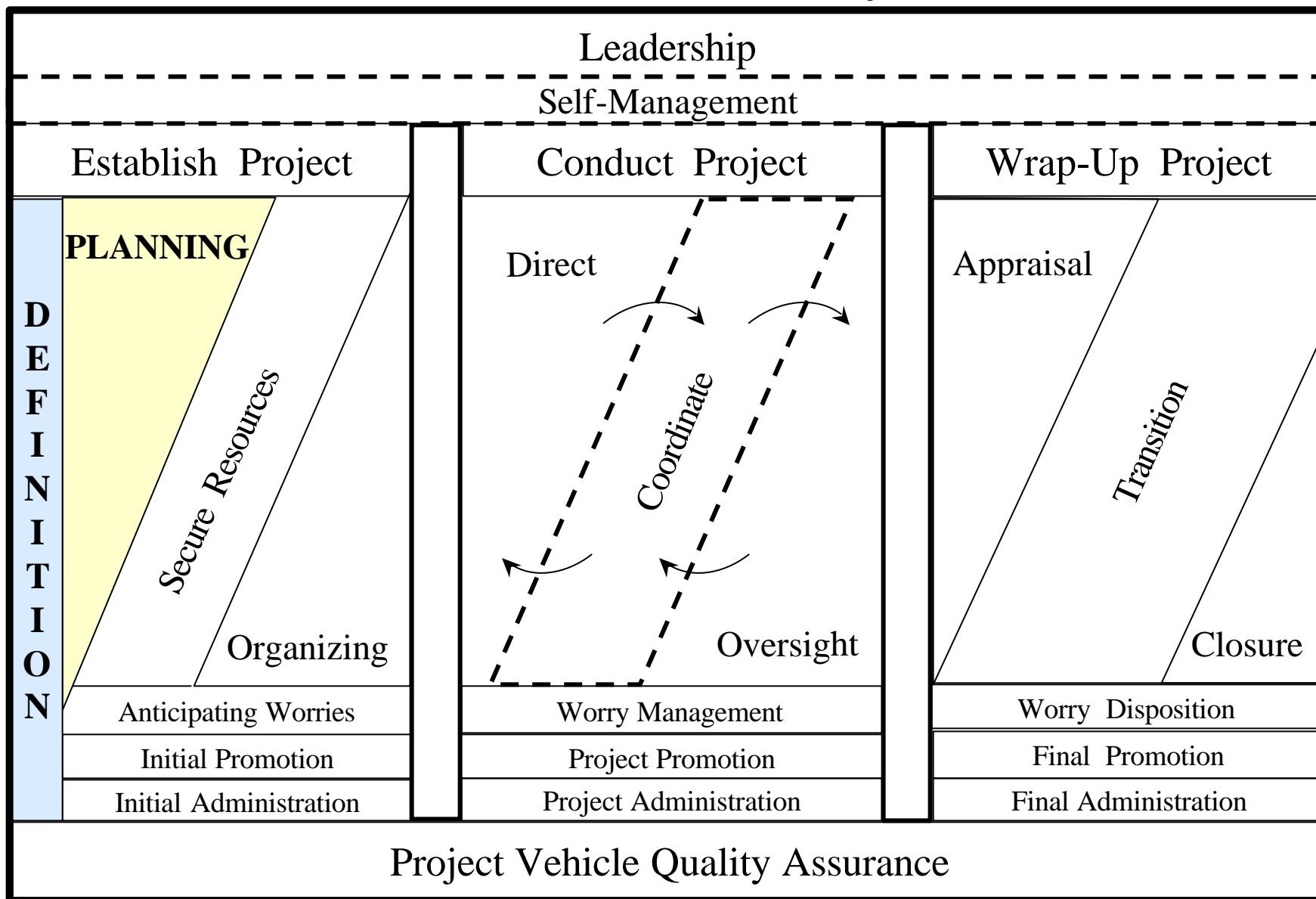
# Aspects of Project Management -- Vehicle



# Aspects of Project Management -- Vehicle



# Our Focus for Today

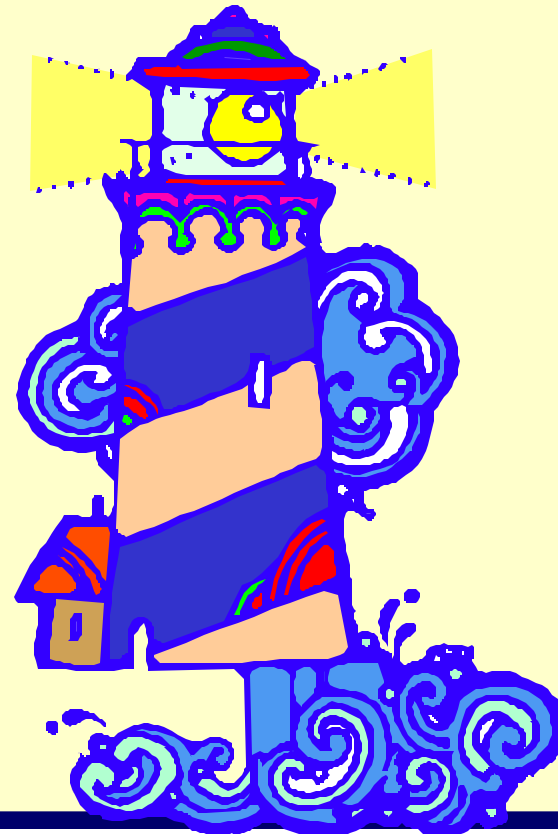


# Napkin Project Definition

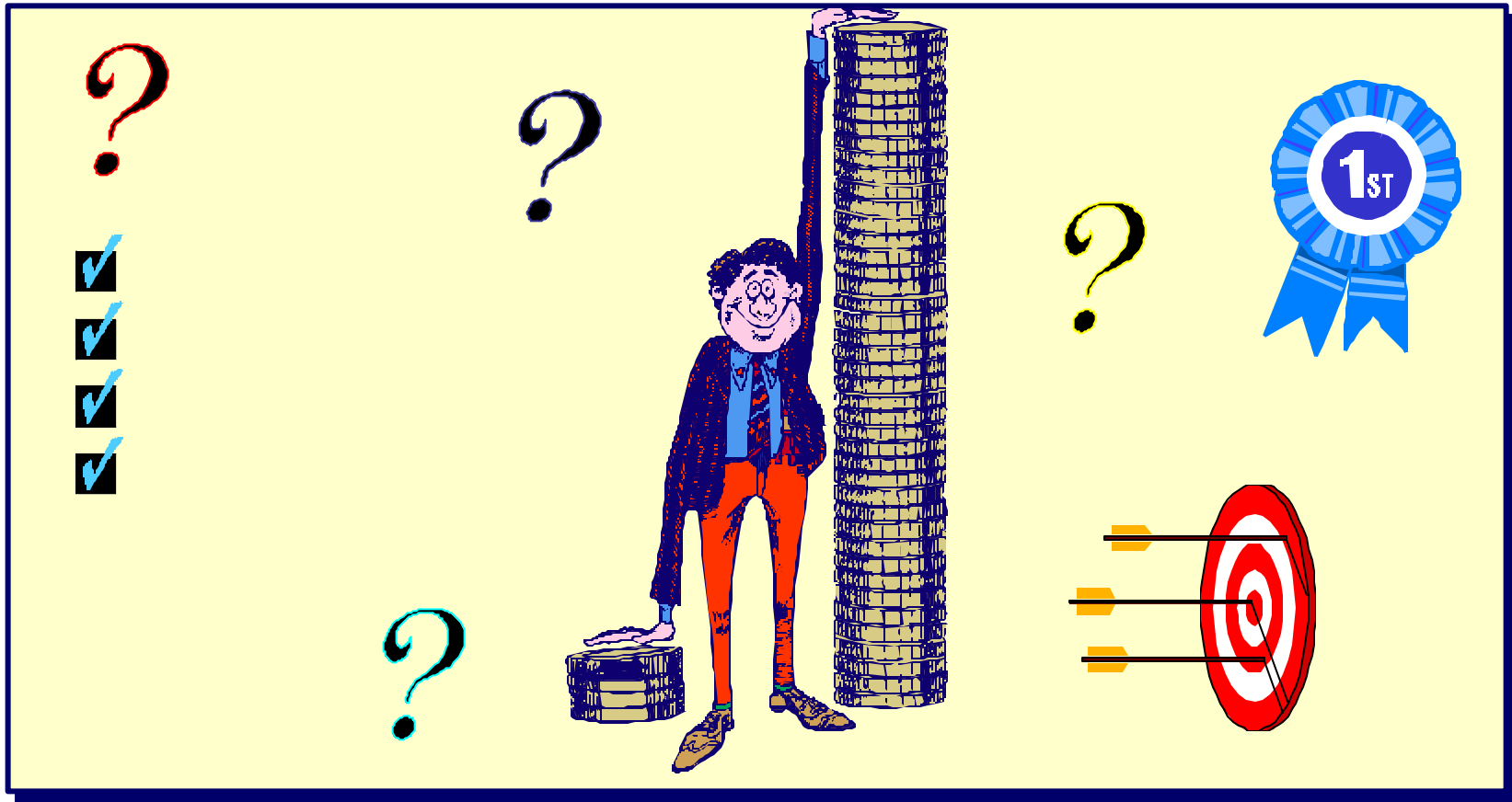
# The Role of Project Definition

## *A Beacon for Success*

To provide a well understood and well accepted statement of what constitutes success for a customer's need without specifying a particular solution.



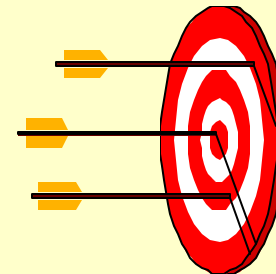
# How Do You Measure Success?



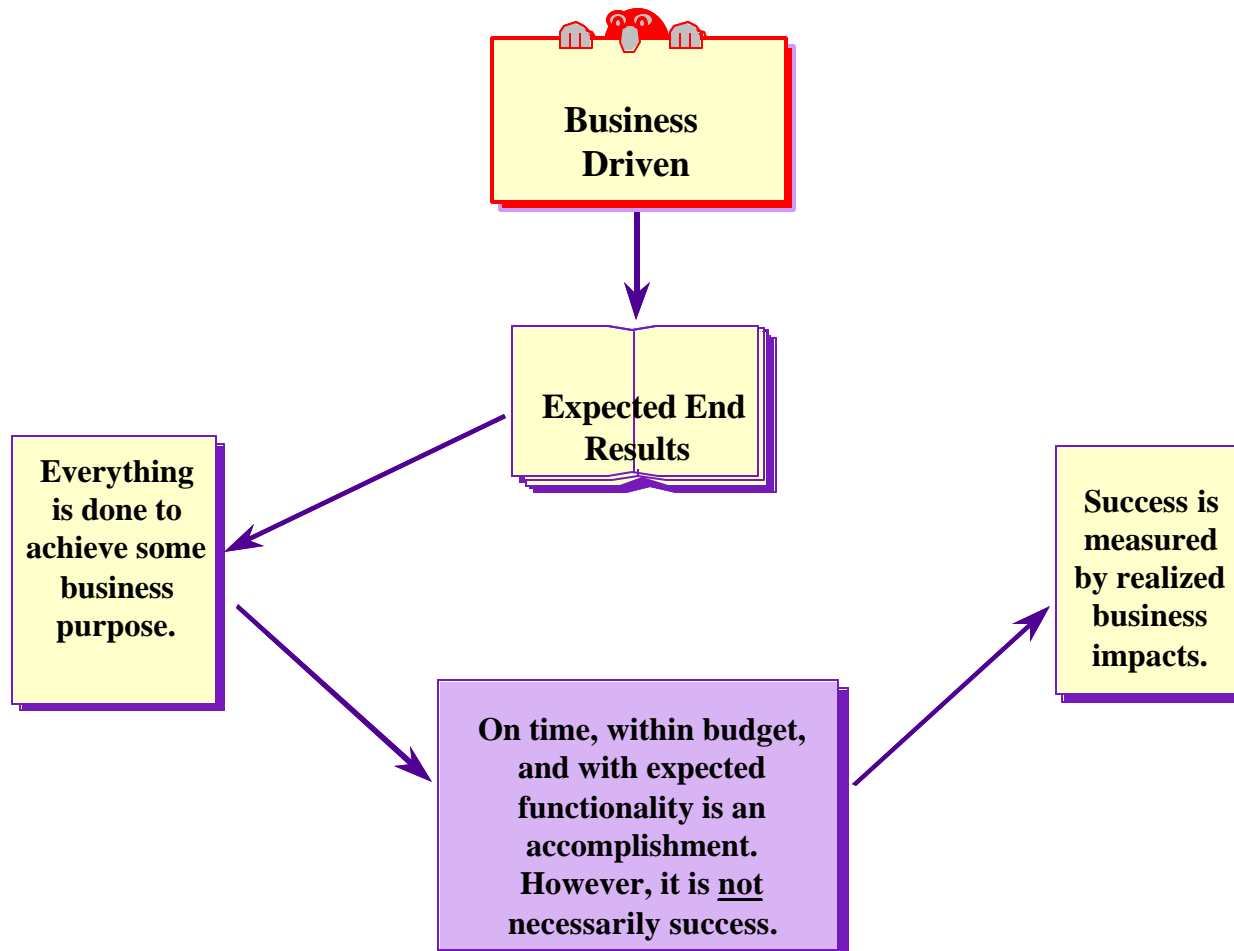
# How Do You Measure Success?



- ✓ RELIABILITY
- ✓ QUALITY
- ✓ SPEED
- ✓ EXPECTED FUNCTIONALITY

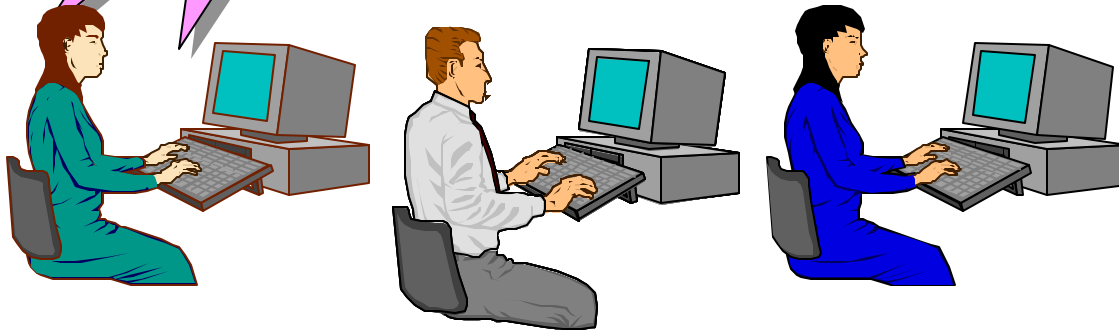
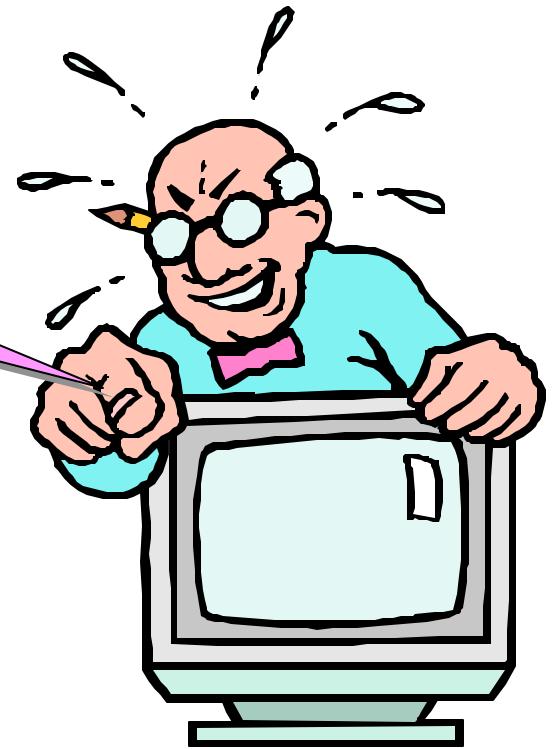


# Success is Achieving the Business Result

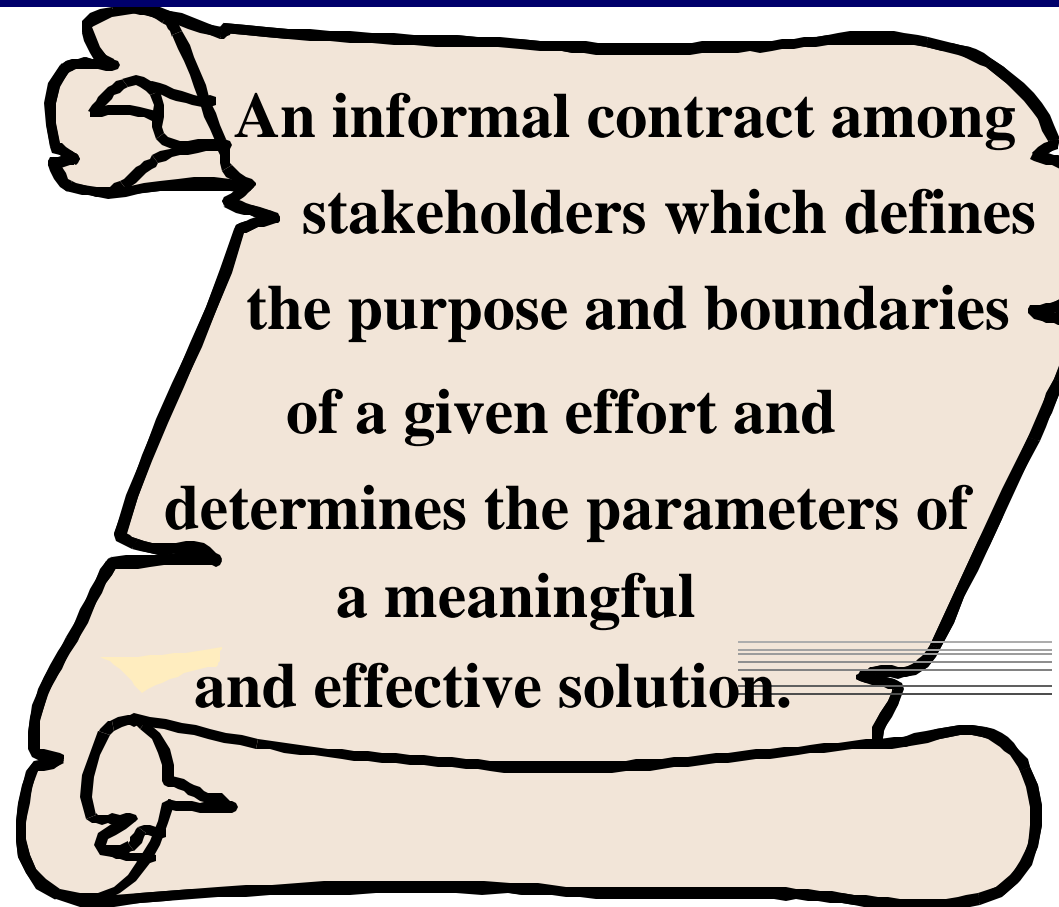


# Avoid Jumping to Solutions

**They want a system  
in a hurry! Start  
coding and I'll see what  
they want.**



# What Advanced Strategies means by a Project Definition



# History of this Technique

- ★ **Launching New Projects**
- ★ **Focus Sessions to get Projects which are in Trouble back on Track**
- ★ **Widely Adopted by Many Clients as Part of their Funding Process**
- ★ **Three Day Training Course**

# Elements of Project Definition

## PROJECT DEFINITION

**INTENTIONS**

**VALUES**

**FOCUS**

**CONTEXT**

# Elements of a Project Definition

**Intentions** →

**The expected end results of the project - ideally expressed in business terms; the reasons the enterprise is expending resources.**

**Values**

**Focus**

**Context**

# Elements of a Project Definition

**Intentions**

**Values →**

**Common beliefs to be used when  
trade-offs must be made.**

**For example: cost vs. speed vs. focus**

**Focus**

**Context**

# Values Guide the Process



**Values :**

**- Quality vs. Speed**

**Should we “buy” more of  
both via:**

**- Additional Cost?**

**- Additional Risk?**

**- ...**

# Elements of a Project Definition

**Intentions**

**Values**

**Focus →**

**Context**

**The domain of the effort; what is in scope and out of scope; whose perspective should be included during business analysis, how far into the future we should plan for, what initiatives the solution must integrate with.**

# Elements of a Project Definition

**Intentions**

**Values**

**Focus**

**Context →**

**Other parameters which should be commonly established, agreed upon and monitored during the project.  
e.g. Obstacles, Risks, Directions, ...**

# Napkin Exercise



# Uses of a Project Definition

- **Defines the Purpose and Boundaries of an Effort**
- **Builds Support and Commitment of Stakeholders**
- **Basis for Project Planning**
- **Targets the Conduct of the Project – Ensures Everyone is Moving in the Same Direction**
- **Identifies and Plans for Key Hurdles Up-front**
- **Ensures Key Terms are Commonly Understood**

# Uses of a Project Definition

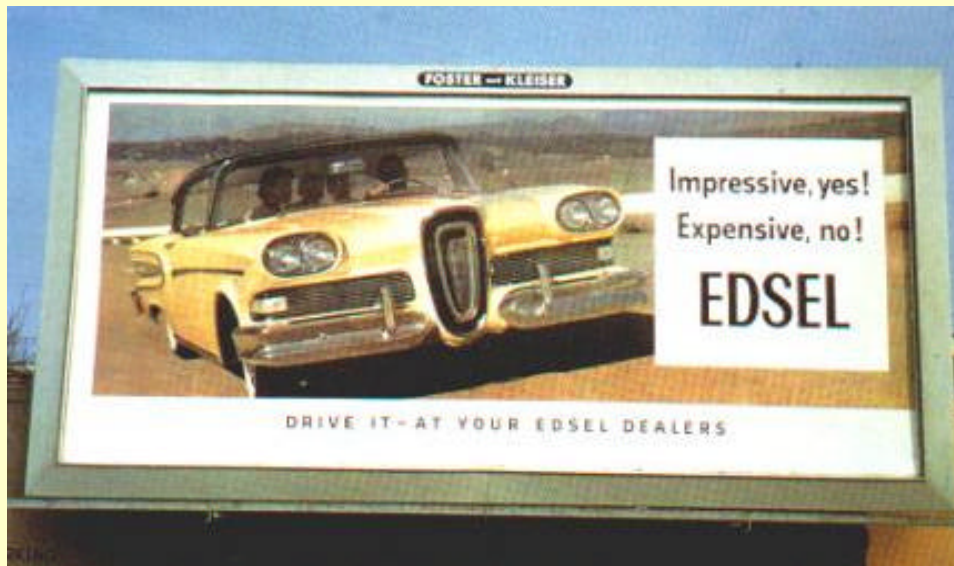
*“It’s better to spend \$50,000 to find out that a project doesn’t make sense than to spend \$500,000 on something that won’t get used.”\**

\*“Home Field Advantages”, CIO Magazine, Oct.15 1997 p 36



# Remember - Success is Meeting a Business Need

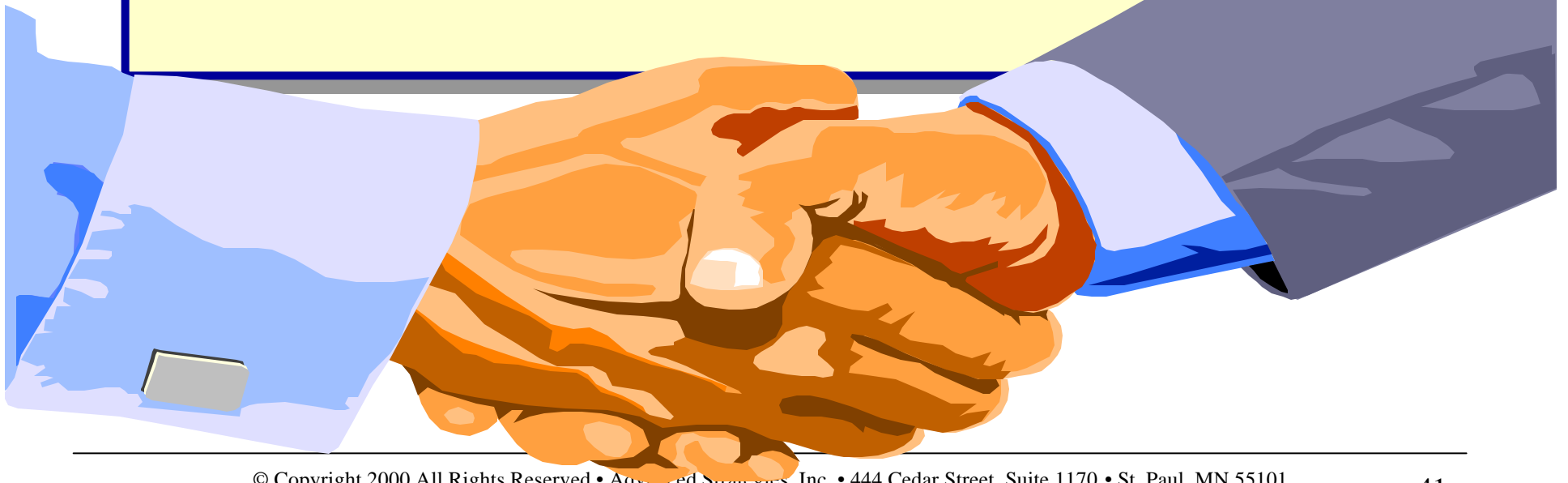
**Too Many Times Technologists Don't Want a Project Definition, They Just Want a Project That is New, Exciting, and Leading-Edge, ...!!!**



“Uses enough Chrome to Tax the Output of the World’s Mine’s”

Popular Science, 1957

**Even if the Project Definition costs  
you the Project, it can win you a  
Business Partner!**



# Examples from Ill-Defined Projects

★ **Intentions**

★ **Values**

★ **Focus**

★ **Context**

# **Review: What are the Minimal Elements of a Project Definition?**

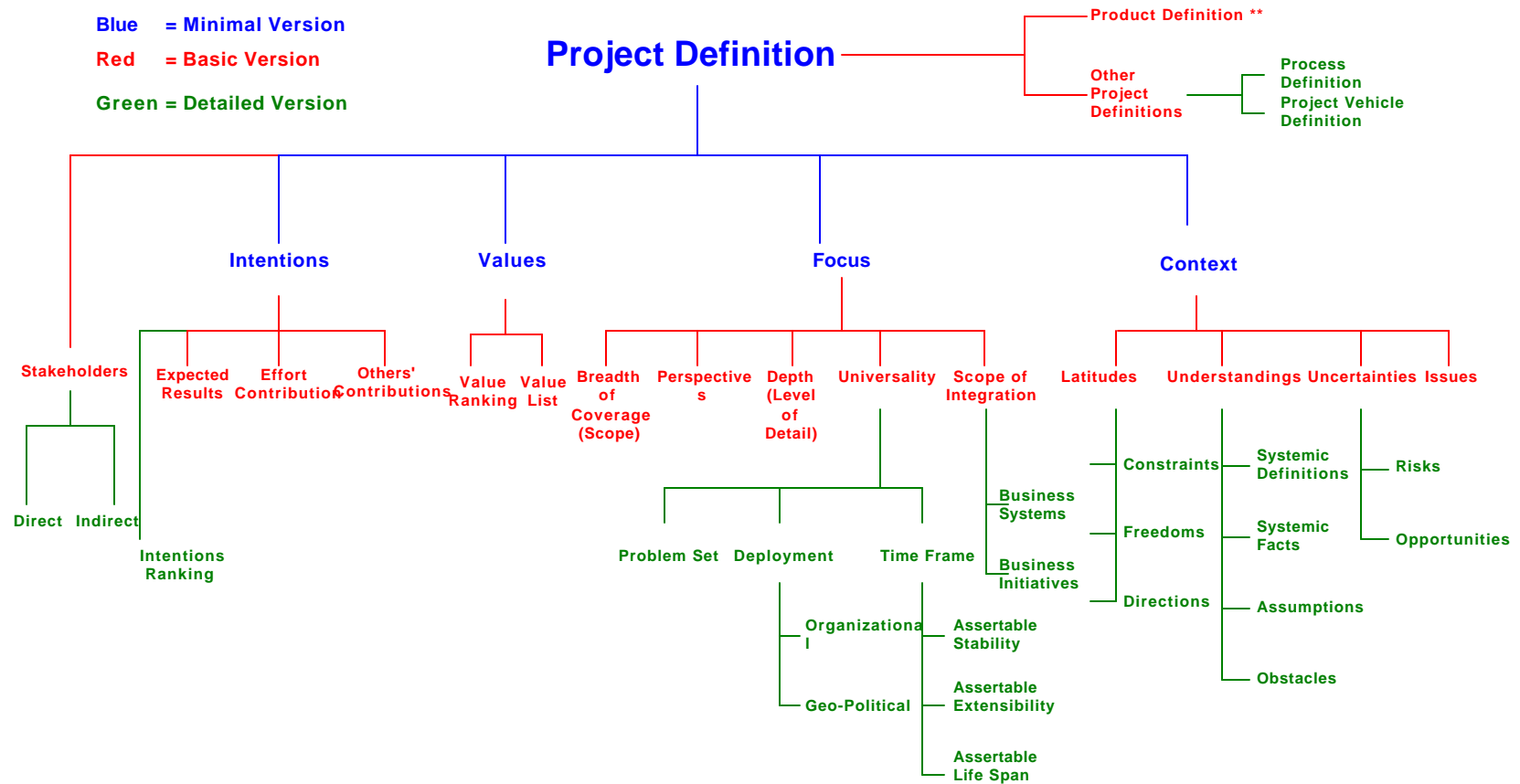
**INTENTIONS**

**VALUES**

**FOCUS**

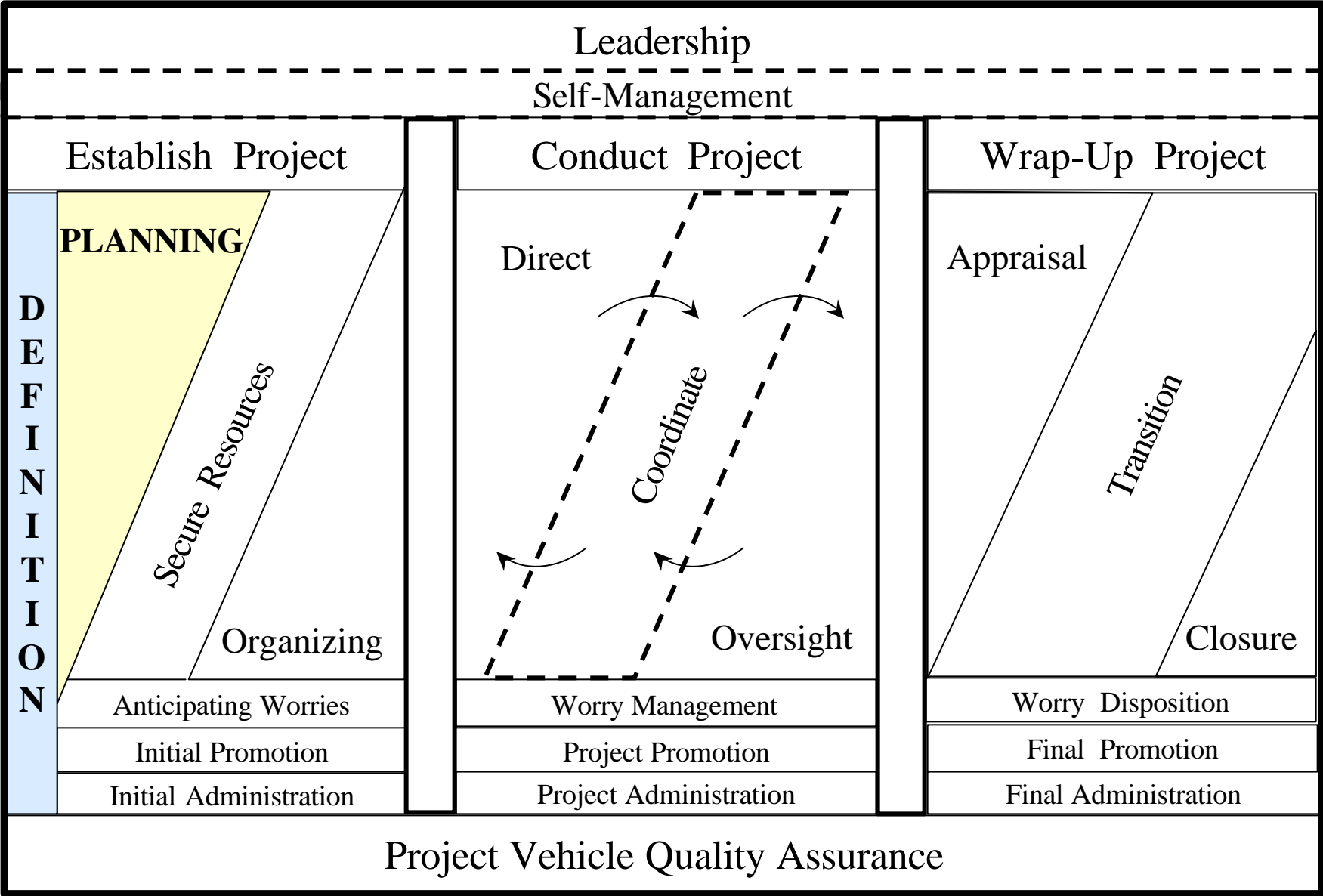
**CONTEXT**

# A Detailed Project Definition

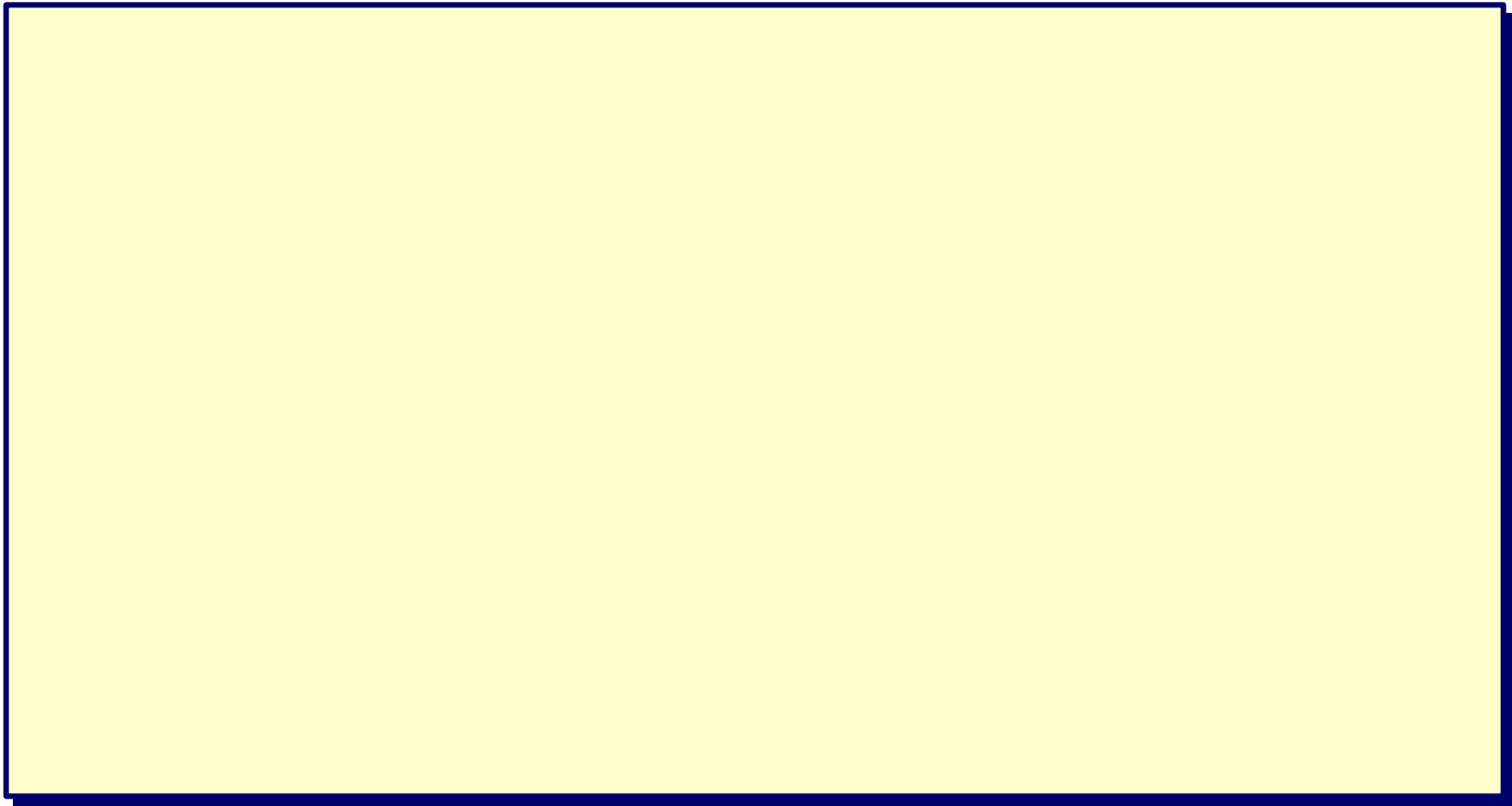


# Napkin Project Planning

# Our Focus for Today



# Why Plan? – Your Experience



# Why Plan?

- **To provide direction or road map toward goals**
- **Communication and coordination of team member**
- **Allows for scheduling and provides a benchmark which you can determine progress**
- **Determine/demonstrate feasibility**
- **Helps keep peace of mind (when things are laid out)**
- **Inspires confidence**
- **Minimizes risk**
- **Can be reviewed and evaluated for whether it's working**
- **Supports process improvement**

# Project Planning

**Project Planning includes:**

- **Determining the overall and detailed approach to the effort;**
- **Identifying and preparing for contingencies; and**
- **Day to day identification of needed actions and results.**

**This seminar emphasizes the first of these:**

***★Determining the process that is expected to be followed in conducting the project and producing its results.***

# What is a Plan?

**A definition:**

**“A temporary,  
imprecise model (or description)  
of a desired future process (or activity)  
whose successful execution  
can be reasonably believed to be likely,  
but is not certain.”**

# Why are Plans Temporary, Imprecise and not Certain?

## What are the options?

- **No plan**
- **Plan forever (to be complete and accurate)**
- **Treat a temporary, imprecise plan as unchangeable**
- **Create a temporary and imprecise plan, acknowledge it is not certain and make adjustments as knowledge is gained**

# Four Key Characteristics of a Plan

- **Honest**
- **Realistic**
- **Understandable**
- **Defensible**

# Three Minimum Elements of a Complete Plan

- **What is the Process (or Activity)?**
- **When will it be done?**
- **Who will do it? (What resources will be deployed to do it?)**

# Napkin Project Plan

P<sup>3</sup>R0001.vsd

What will be done?

When will it be done?

What resources are needed to do it?  
(e.g. who will do it?)

ID	Process/Activities	Schedule	Resources
1	Update all user versions	Mar 1	John
2		Mar 4	Sr. Analyst
3			John & User

# Napkin Exercise



# More Involved Project Plans

**A more involved Project Plan still contains the three basic elements.**

**A more involved plan may:**

- ★ Incorporate more details**
- ★ Show more interim work**
- ★ Increases the sophistication/precision of how the plan is developed**
- ★ Include additional elements**
  - Precedence, Sizings, Costs, Deliverables, Schedule, ...**

**Remember: Never forget the napkin, when the napkin is enough.**

# Using a Rolling Plan

## Rolling Plan Components

- **Historical**
- **Working**
- **Forecast**

**Note: We can also have**

- **Historical Plans (Actuals)**
- **Working Plans**
- **Forecast Plans**

# Using the Project Definition in Planning

**What are the four elements to utilize?**

# Using the Project Definition in Planning

## **Intentions**

- ★ **First, design the plan to achieve these**

## **Values**

- ★ **Test and adjust the plan to handle these**

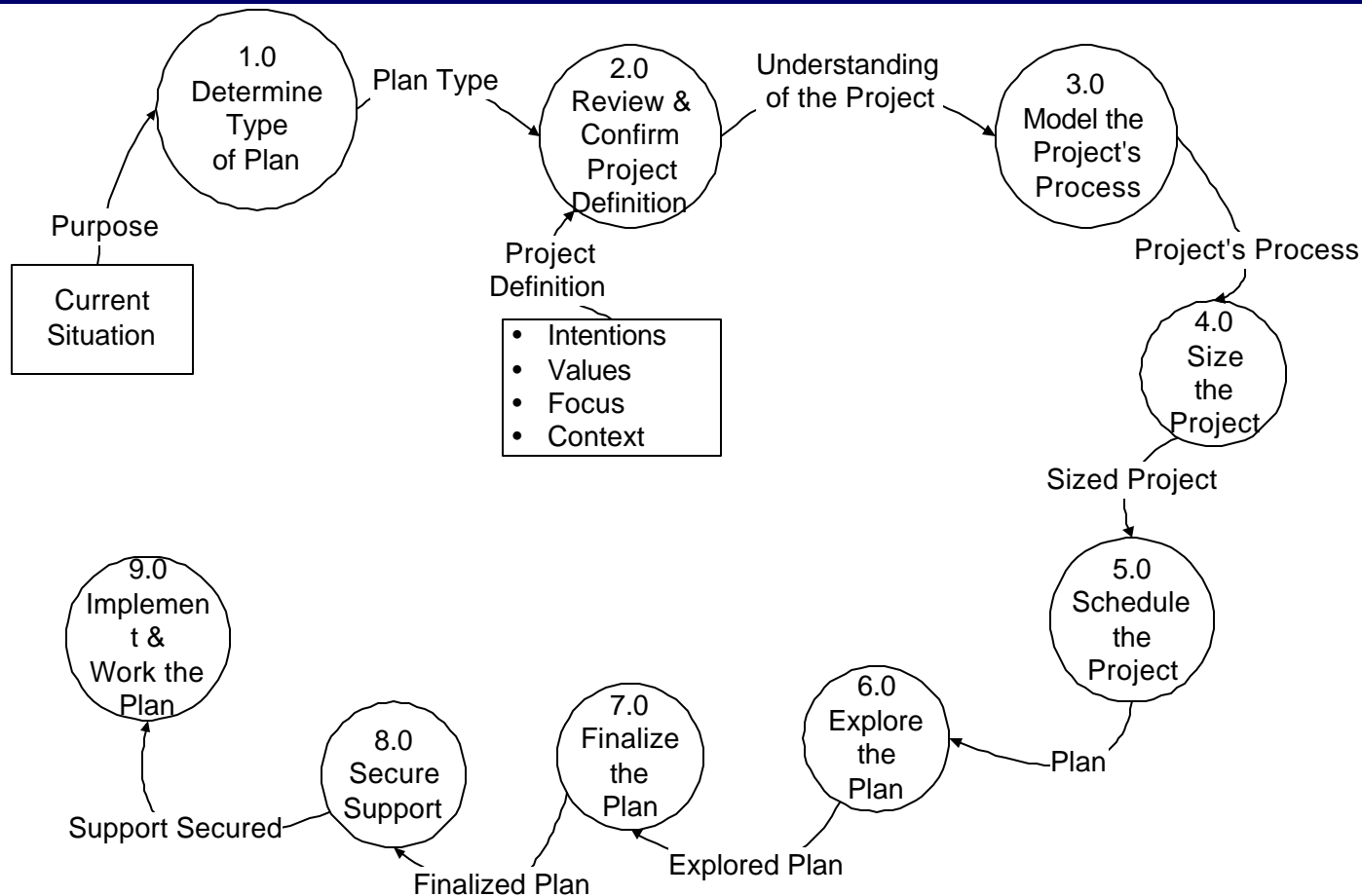
## **Focus**

- ★ **Modify and extend to cover these**

## **Context**

- ★ **Extend the contextual logs as the plan is developed and executed**

# Behind the Scenes of the Napkin Plan



# Notes on Modeling the Project's Process



# Size First, Then Schedule

# Explore for Sustainability

- **Does the plan make sense?**
- **Is the plan explainable, defensible and politically sustainable?**
- **Does the plan produce visible deliverables at appropriate intervals to meet management's needs and sustain interest in the effort?**
- **Are the assumptions realistic and the issues reasonable?**

## **Notes:**

- 1) Any adjustment must be realistic and explainable.**
- 2) Continue to document assumptions, issues, etc.**

# Explore the End Date

**Examine the end date: is it acceptable?**

- ★ **If not, shift or add resources; or make other realistic adjustments.**
- ★ **Or declare the effort undoable as defined.**

**What Happens when we “Plan Backwards”**

**Notes:**

- 1) Any adjustment must be realistic and explainable.**
- 2) Continue to document assumptions, issues, etc.**

# A Note on Contingencies

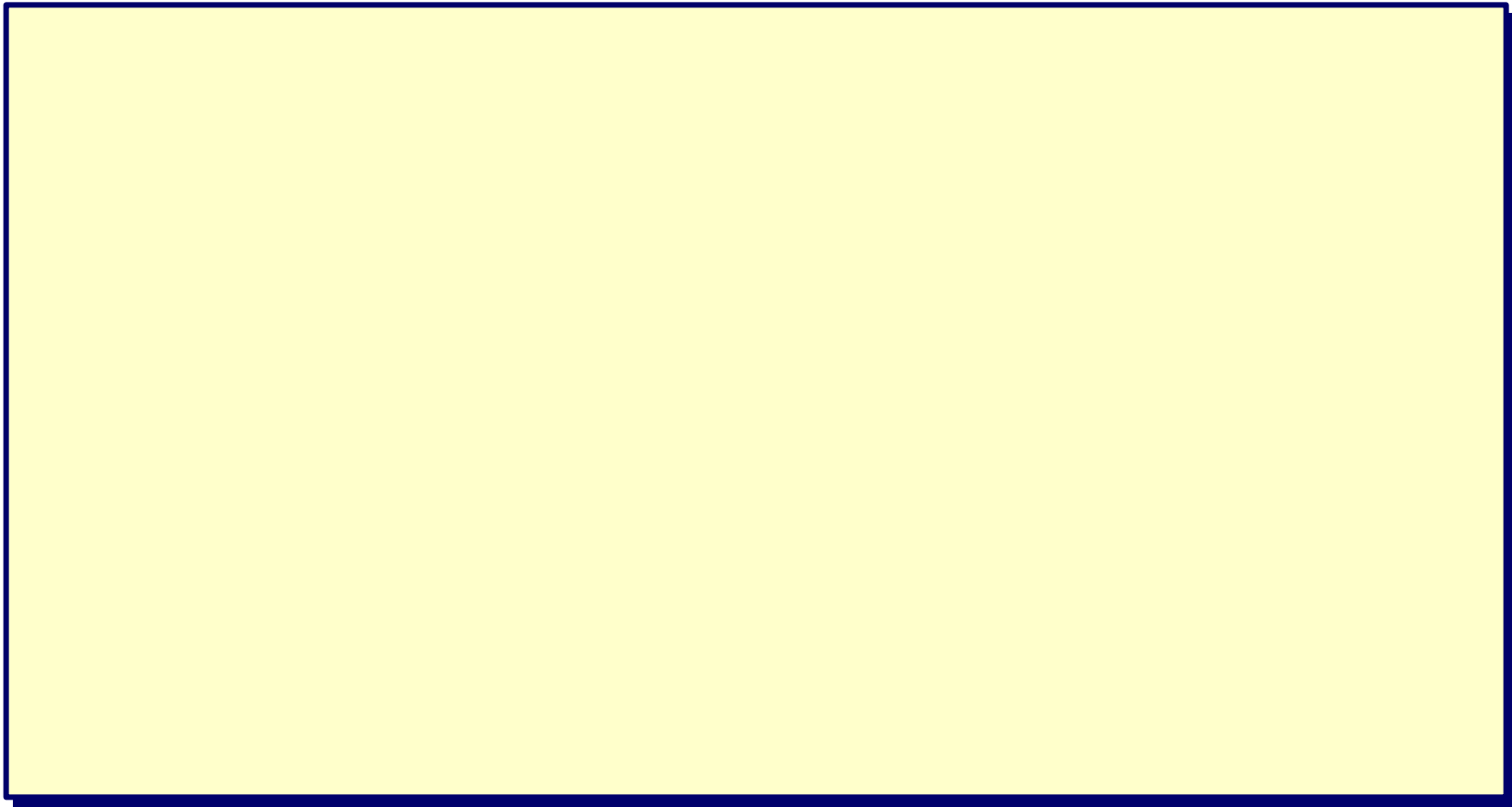
# Review and Conclusion

# Revisiting Why Project's Fail

**How Can Project Definition Help?**

**How Can Project Planning Help?**

# Revisiting Key Points from the Brochure



# Review of Key Messages

## Project Definition

- ★ **Before jumping to solutions, take the time to understand the purpose (business results) and boundaries**
- ★ **Remember that success is hitting the business results**
- ★ **The Four Basic Elements**

## Project Planning

- ★ **Temporary and Imprecise Plans are Often the Best Option**
- ★ **Unless you have unlimited resources - Size then Schedule**
- ★ **Remember the Three Basic Elements**

# Independent Next Steps



Practice, Practice, Practice...

## Suggested Reading

- ★ DeMarco, Tom. *Controlling Software Projects*. (New York: Yourdon Press, 1982).
- ★ Knutson, Joan and Ira Bitz. *Project Management: How to Plan and Manage Successful Projects*. (New York: AMACOM, 1991).
- ★ Lewis, James P. *The Project Manager's Desk Reference*. (McGraw-Hill, 1995).
- ★ Meredith, Jack R. and Samuel J. Mantel, Jr. *Project Management: A Managerial Approach, Third Edition*. (New York: John Wiley & Sons, Inc., 1995).

# How Can Advanced Strategies Help?

## Upcoming Training Courses in St. Paul:

- ★ Project Definition, March 6-8, 2001
- ★ Project Leadership, April 3-5, 2001
- ★ Project Planning, May 1-3, 2001

## Chalk Talks and Other Customized Training

Facilitating Project Definition JDA<sup>sm</sup> Sessions

Project Management Coaching

See [www.advancedstrategiesinc.com](http://www.advancedstrategiesinc.com) for more details

# Conclusion & Questions

## Remember the Goal:

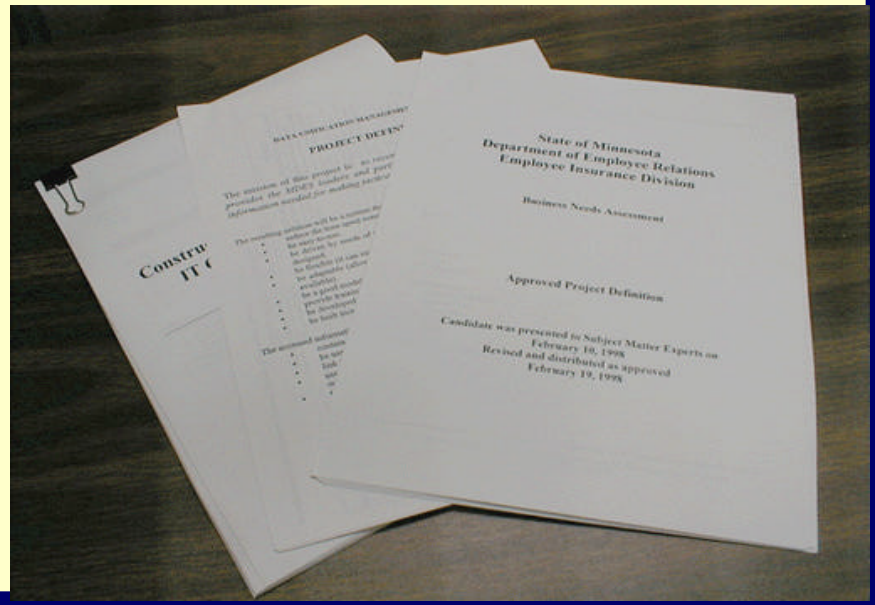
*These techniques will not eliminate  
Chaos, Ambiguity, and Lack of Knowledge,  
but we have found these help to enable people  
to function effectively in spite of these.*



# Backup

# But Wait... There's More!

- ★ **The Project Definition is a Living Document**
- ★ **Consensus of Multiple Perspectives**
- ★ **Napkin Definition vs. Full Definition**



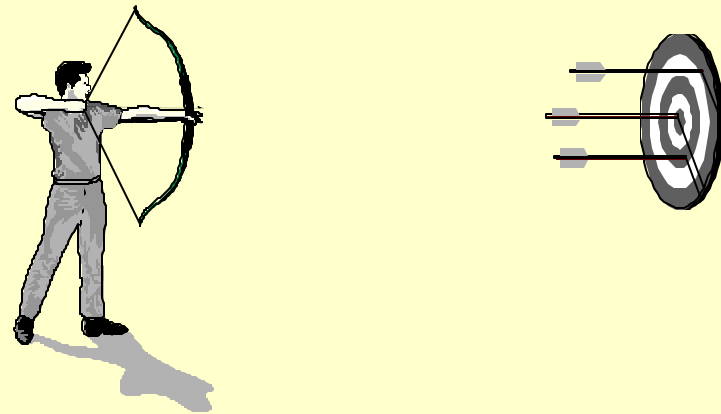
# Regarding Change

**How stable (without changes) is the initial Plan?**

**Are changes bad?**

**What are the alternatives?**

- **A stable target?**
- **A moving target?**
- **No target?**



***Remember: The World is not stationary (chaos, ambiguity, lack of knowledge).***