

Napkin Project Definition and Napkin Project Planning

A Seminar Sponsored Jointly by:

Advanced Strategies, Inc.

Atlanta, GA

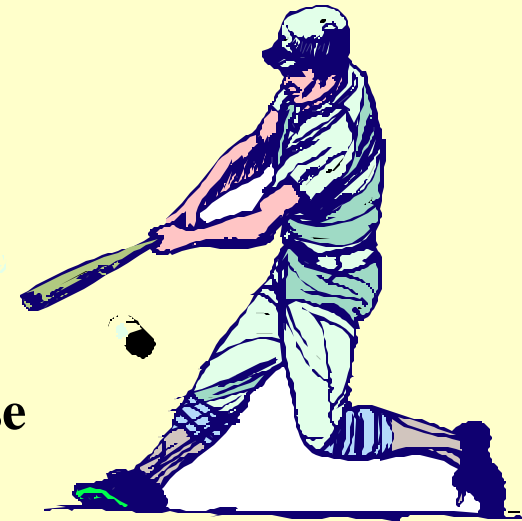


Statistics of IT Projects

- **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



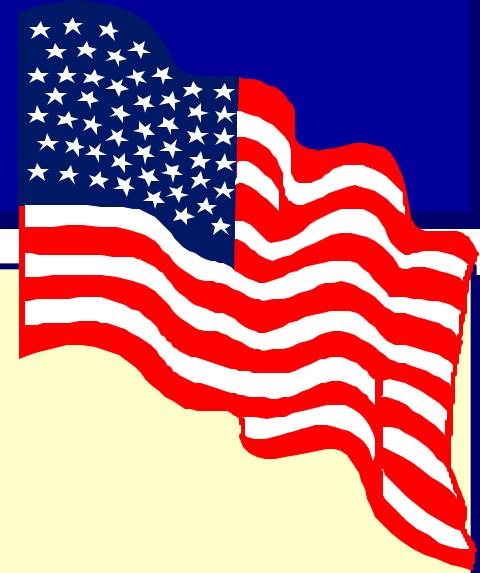
Seminar Intentions

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:

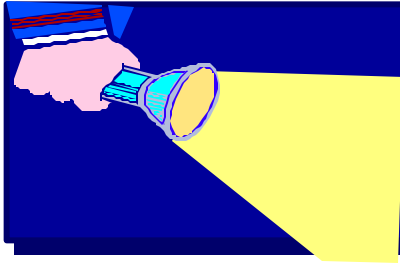
- ★ Understand what is needed by the business**
- ★ Focus the effort**
- ★ Plan and oversee the effort**
- ★ Prioritize between projects**

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**

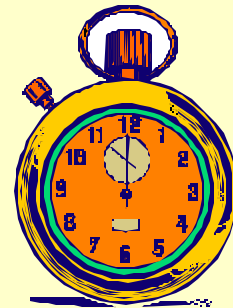
- ★ **All types of Projects**
 - **With an emphasis on small-medium IT Projects**

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*

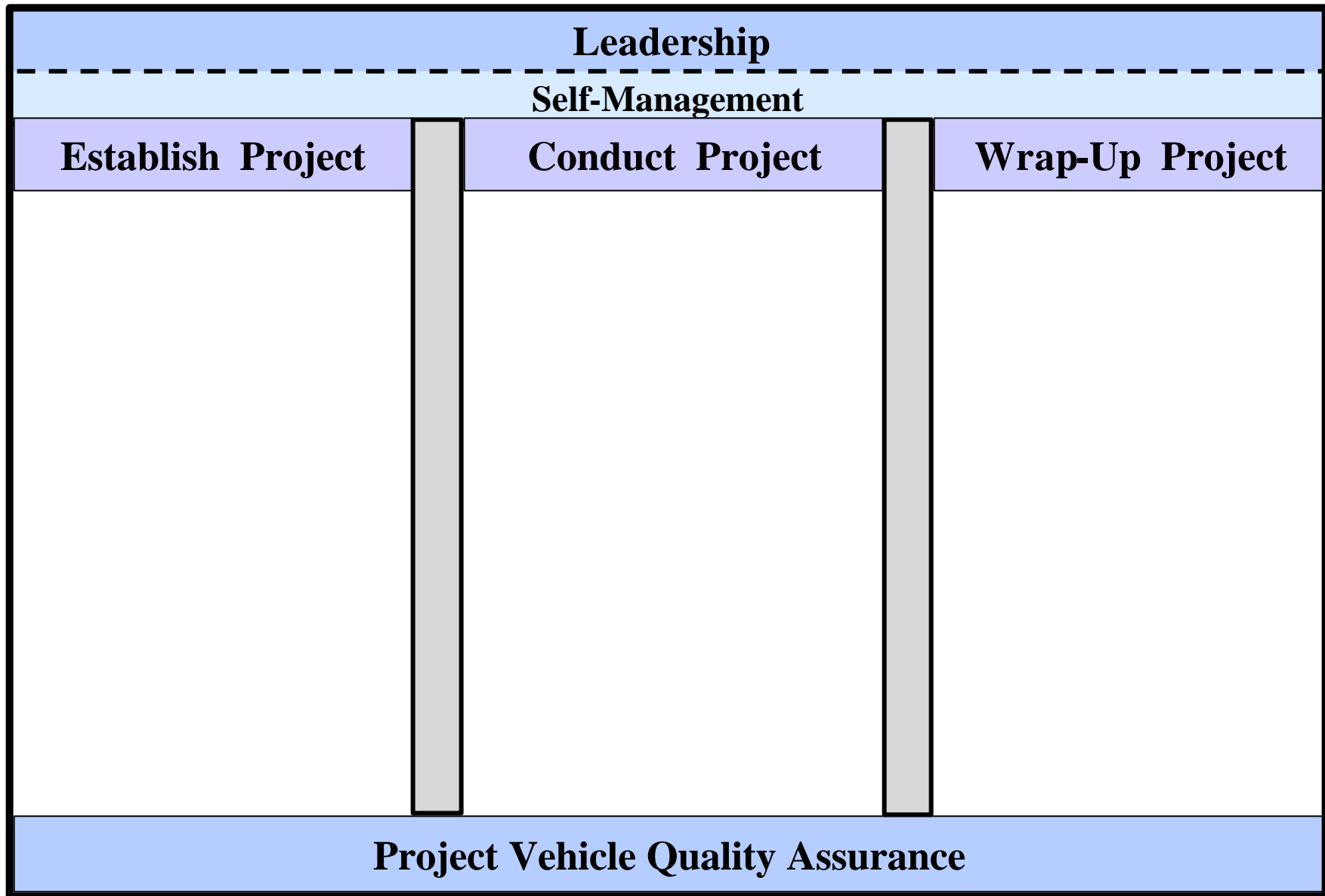
- **achieving a quality level acceptable to the beneficiaries and other stakeholders**
**(who don't always know what they want;
who may lose interest in the effort or priorities may shift due to the urgency of other projects;
and whose interests may conflict with each other)**
- **in spite of a scarcity 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?

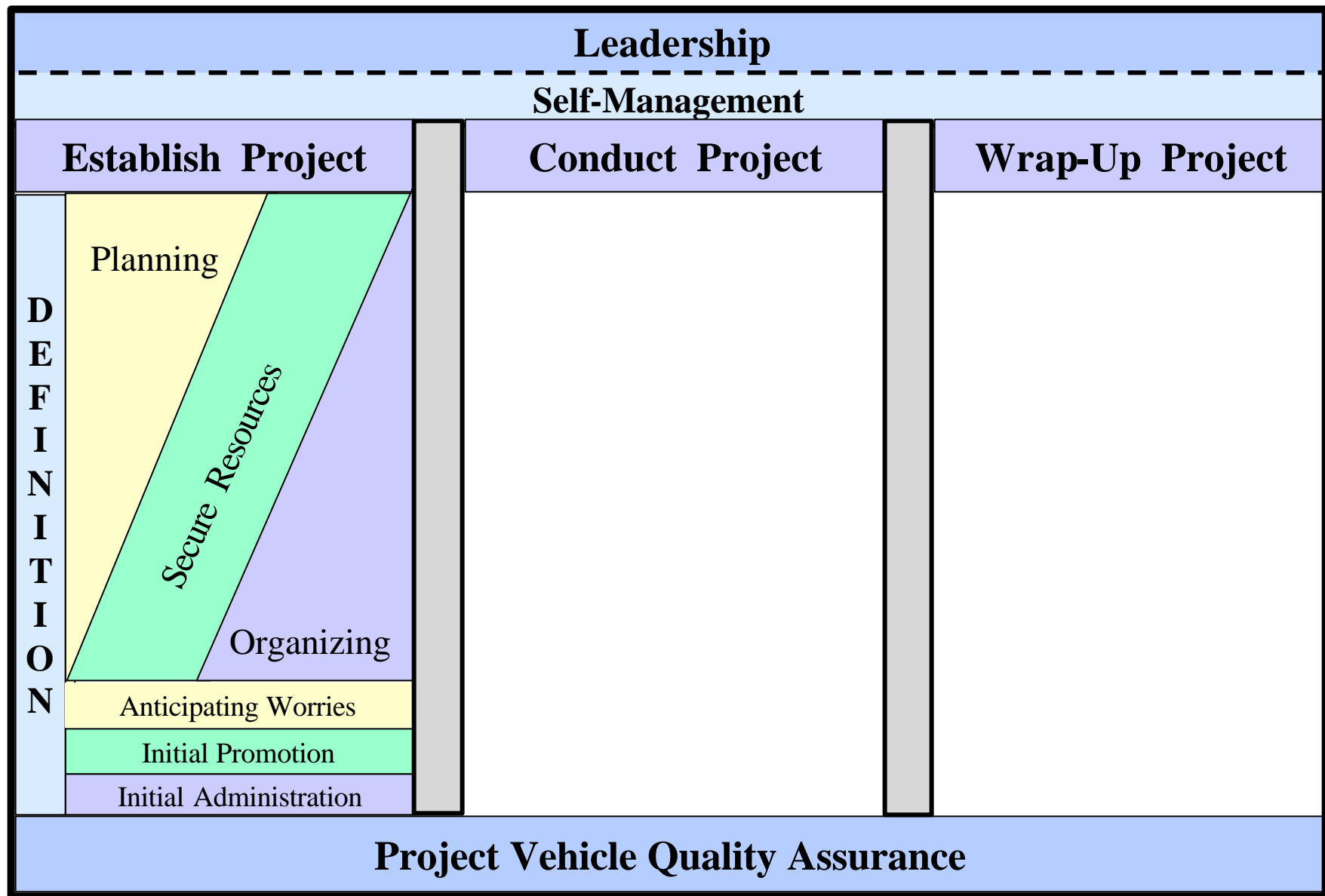
- **A specified set of deliverables**
- **A definite time span**
- **The marshalling of resources including one or more individuals (and other resources)**

- **This includes:**
 - **Formal IT development projects**
 - **Non-IT projects**
 - **Day to day activities**
 - **Non-work projects**

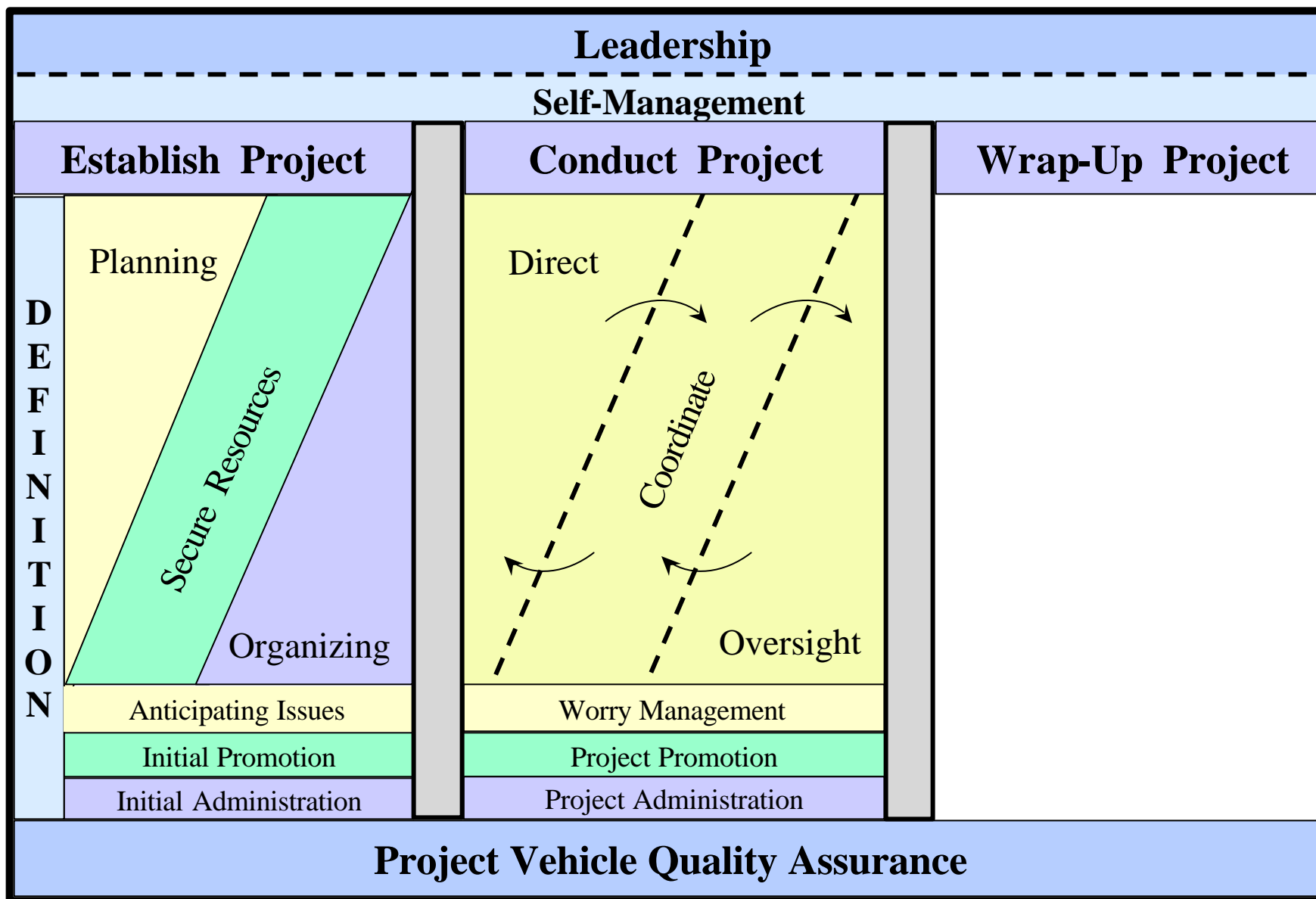
Aspects of Project Management -- Vehicle



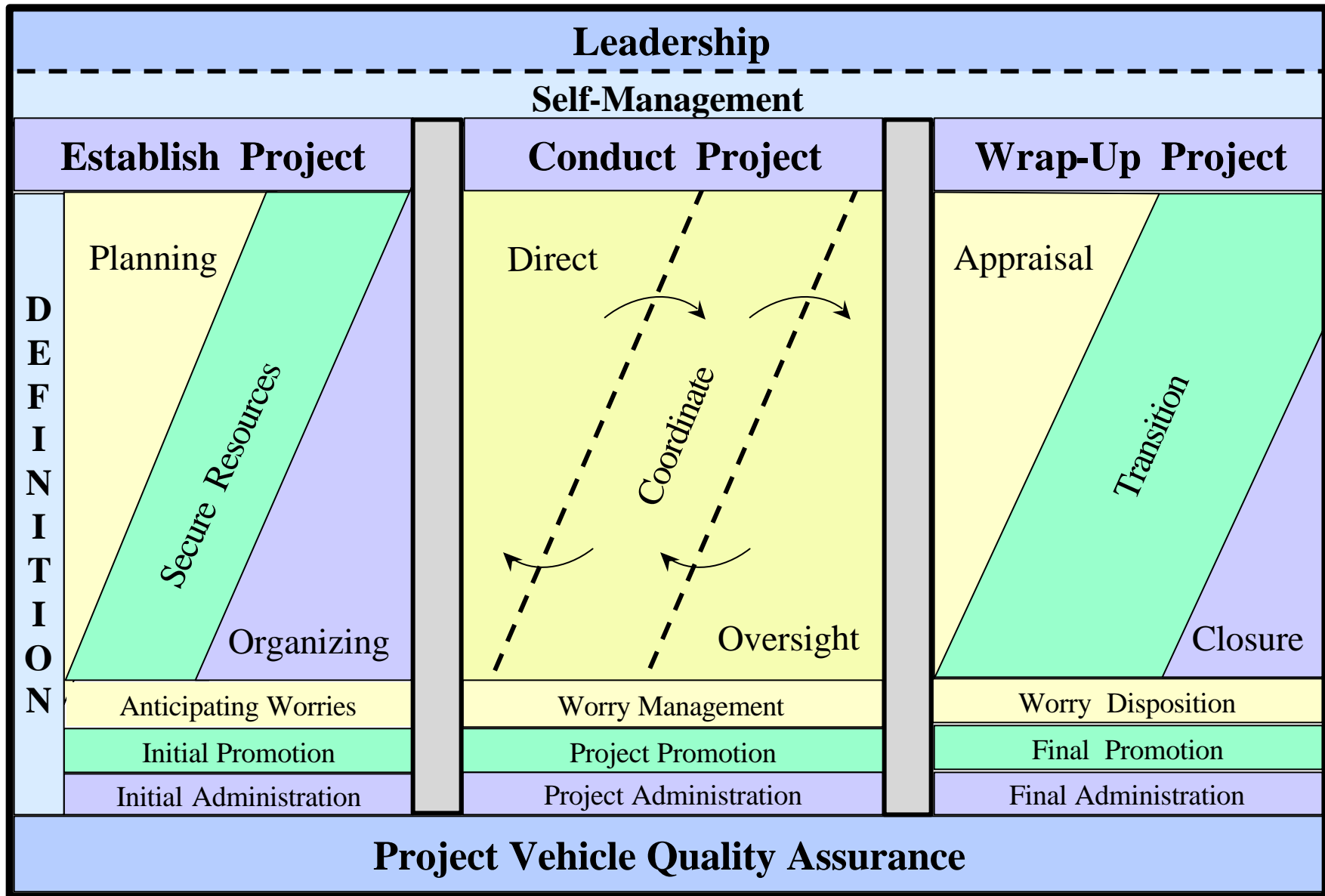
Aspects of Project Management -- Vehicle



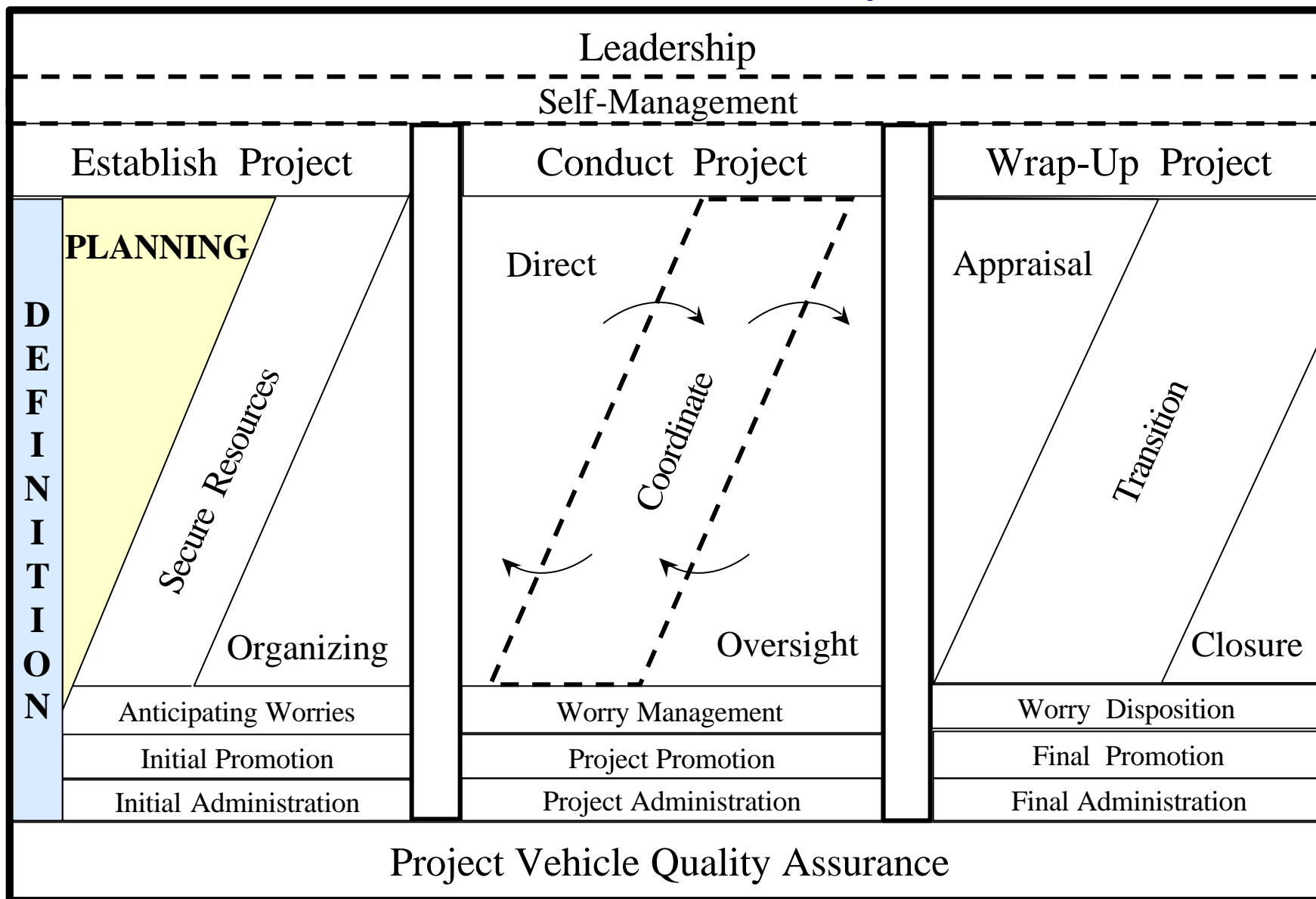
Aspects of Project Management -- Vehicle



Aspects of Project Management -- Vehicle



Our Focus for Today

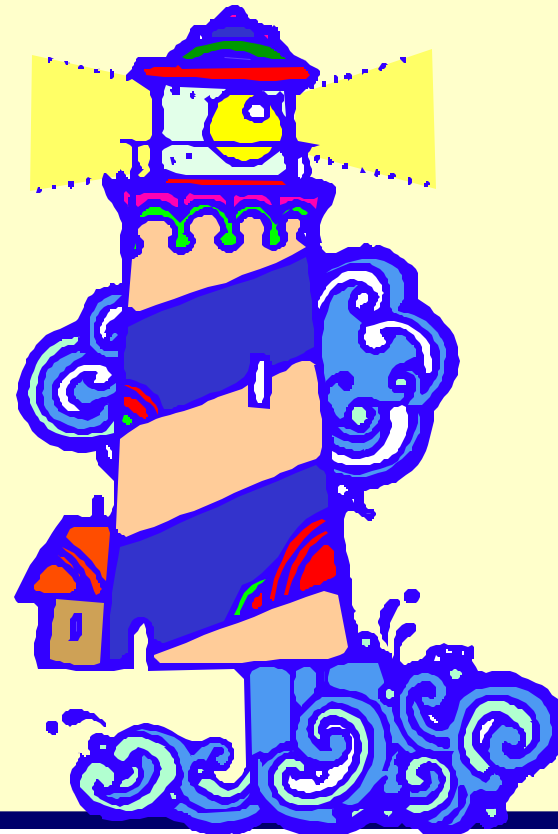


Napkin Project Definition

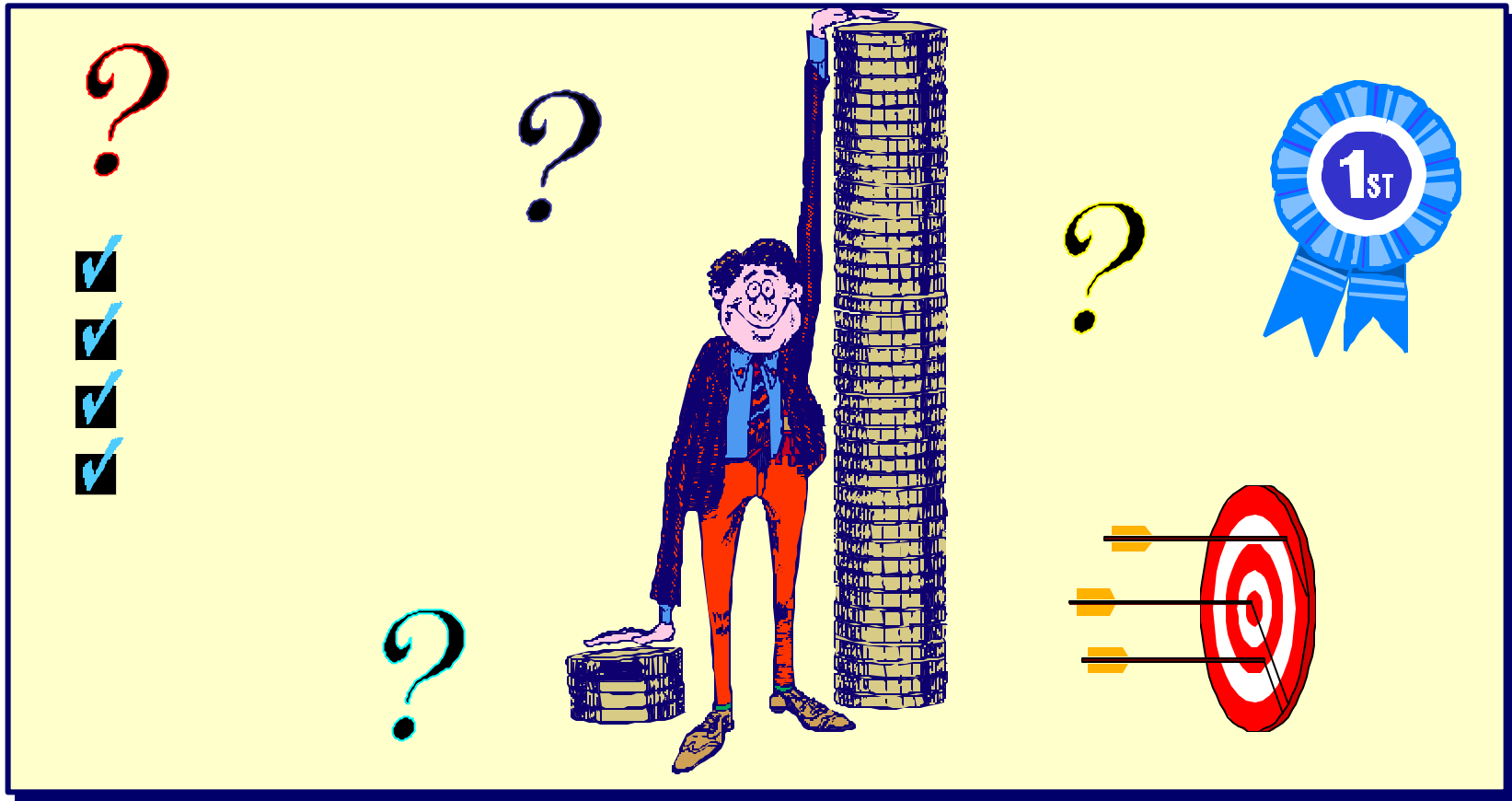
The Role of Project Definition

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.



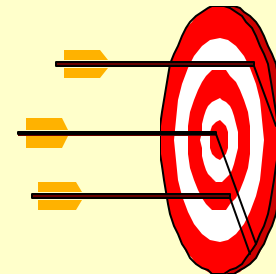
How Do You Measure Success?



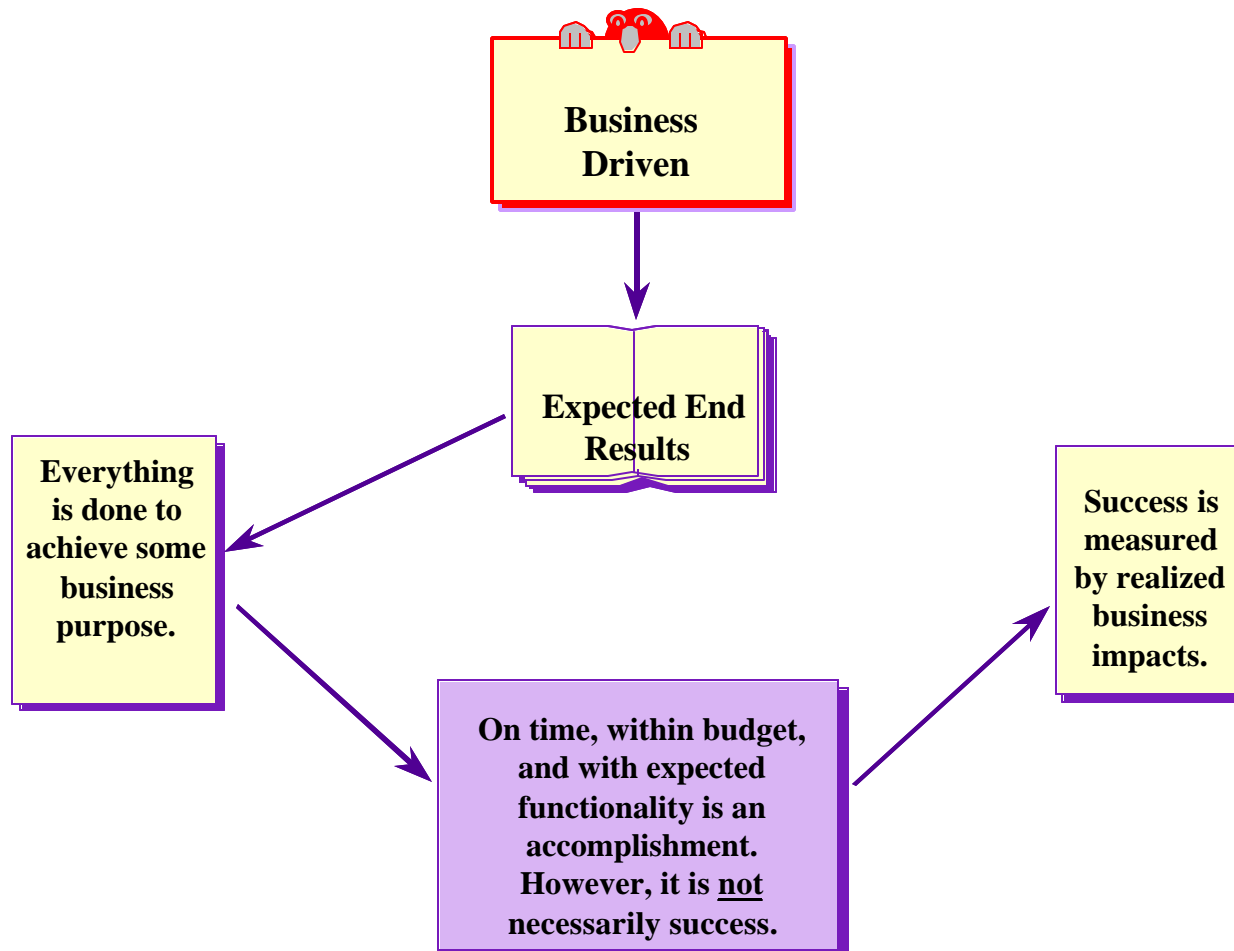
How Do You Measure Success?



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

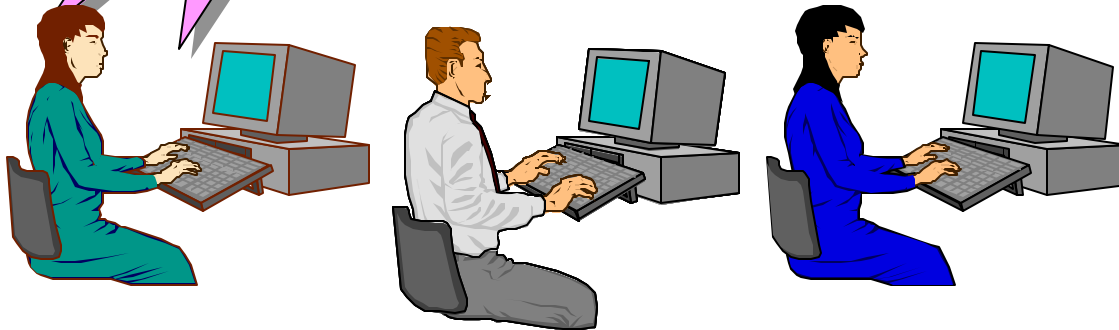
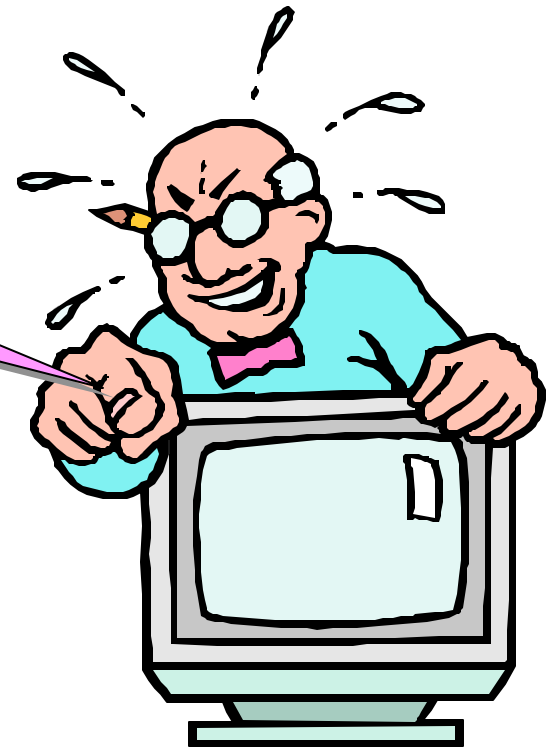


Success is Achieving the Business Result

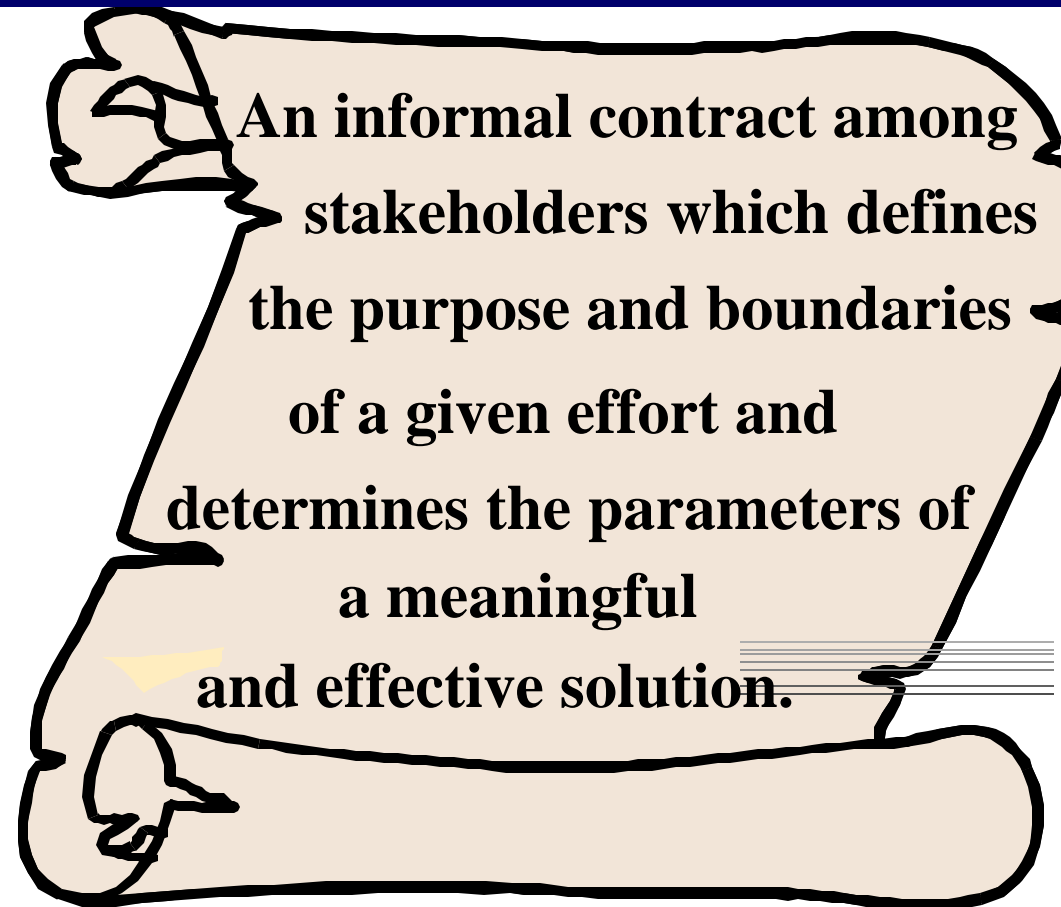


Avoid Jumping to Solutions

**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

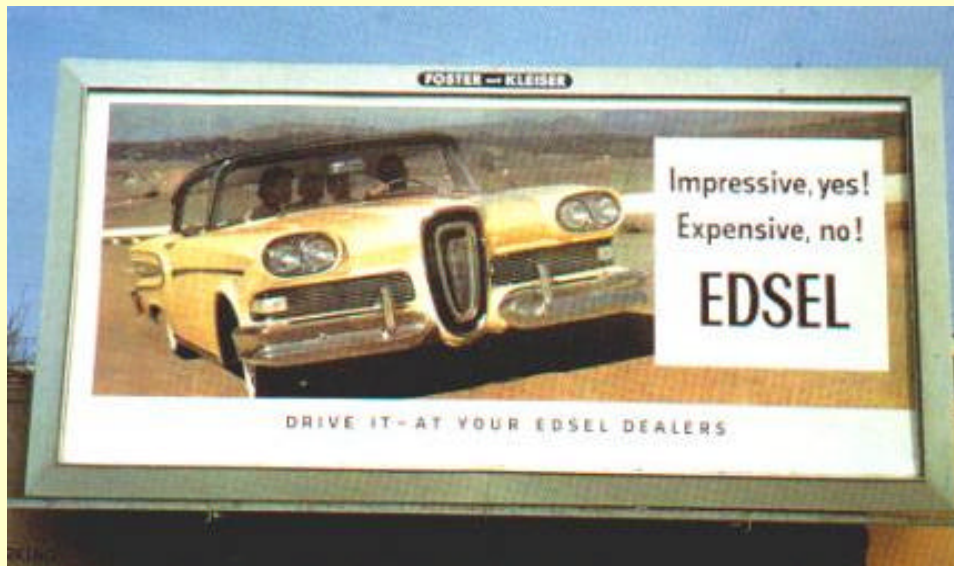
*“It’s better to spend \$50,000 to find out that a project doesn’t make sense than to spend \$500,000 on something that won’t get used.”**

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



Remember - Success is Meeting a Business Need

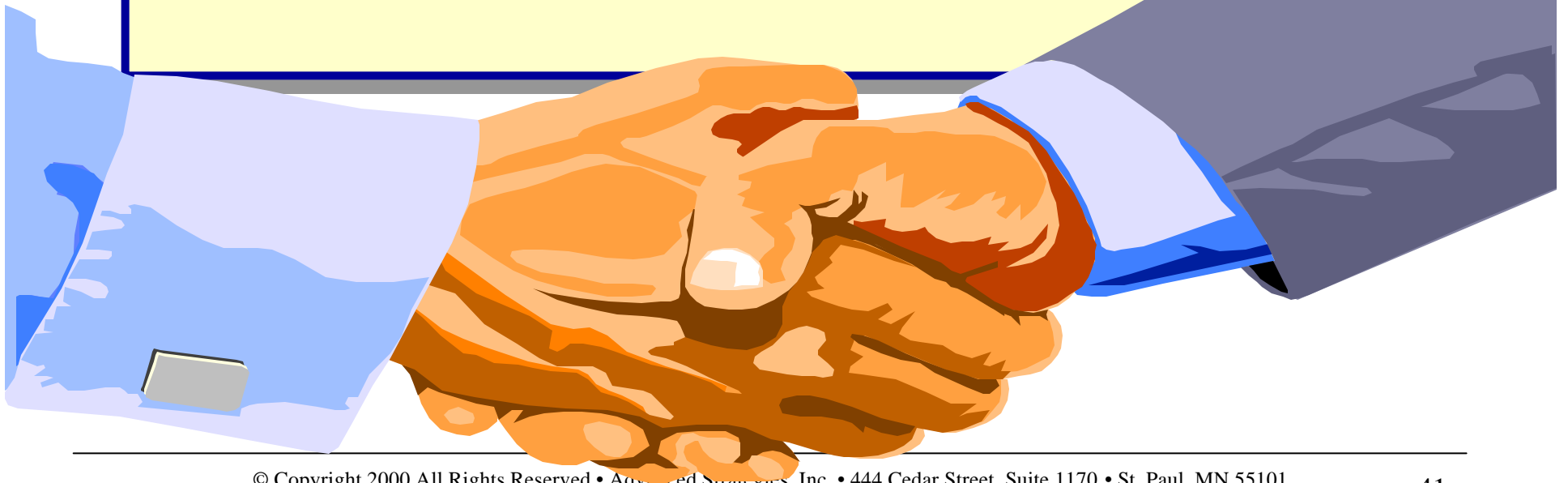
Too Many Times Technologists Don't Want a Project Definition, They Just Want a Project That is New, Exciting, and Leading-Edge, ...!!!



“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?

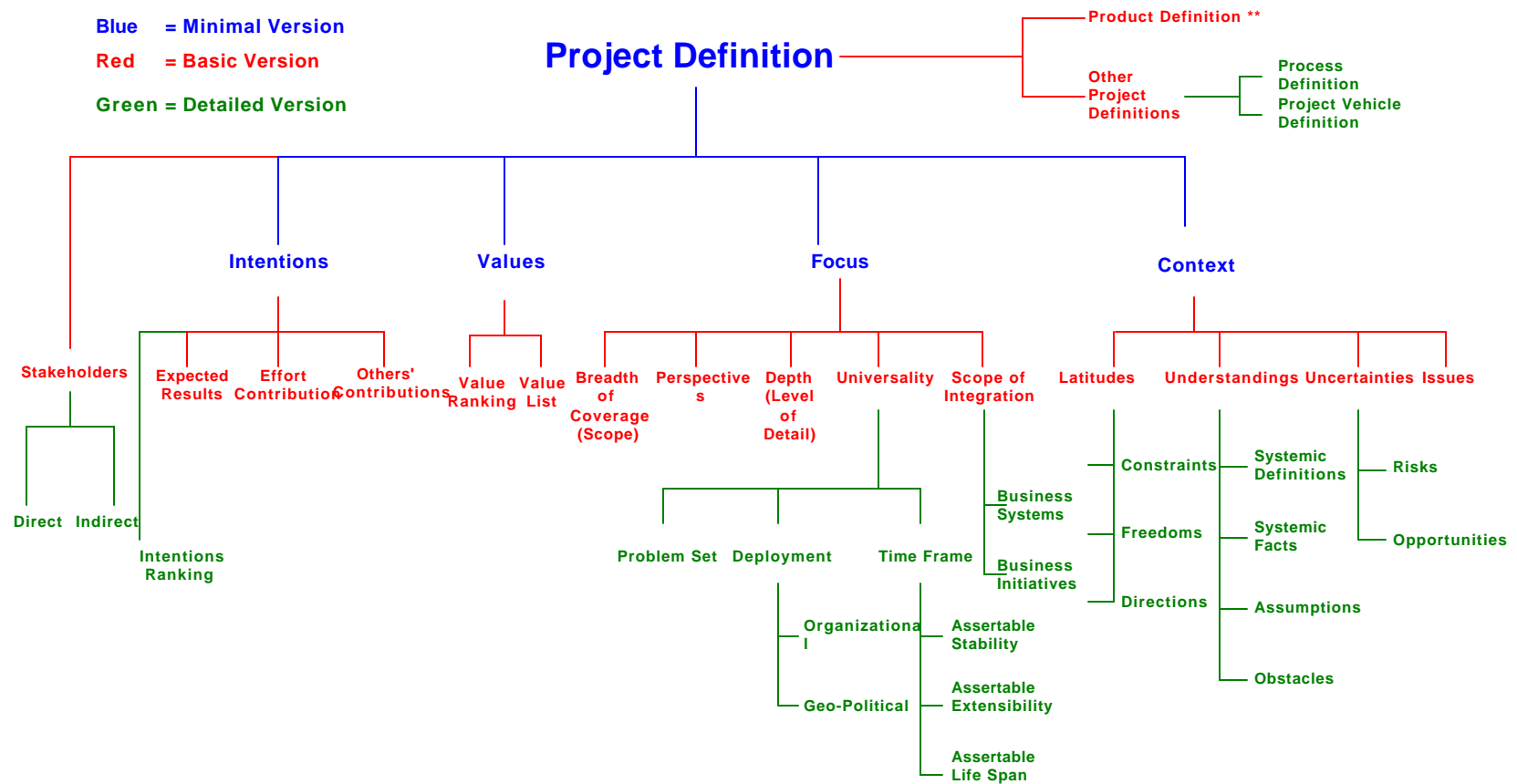
INTENTIONS

VALUES

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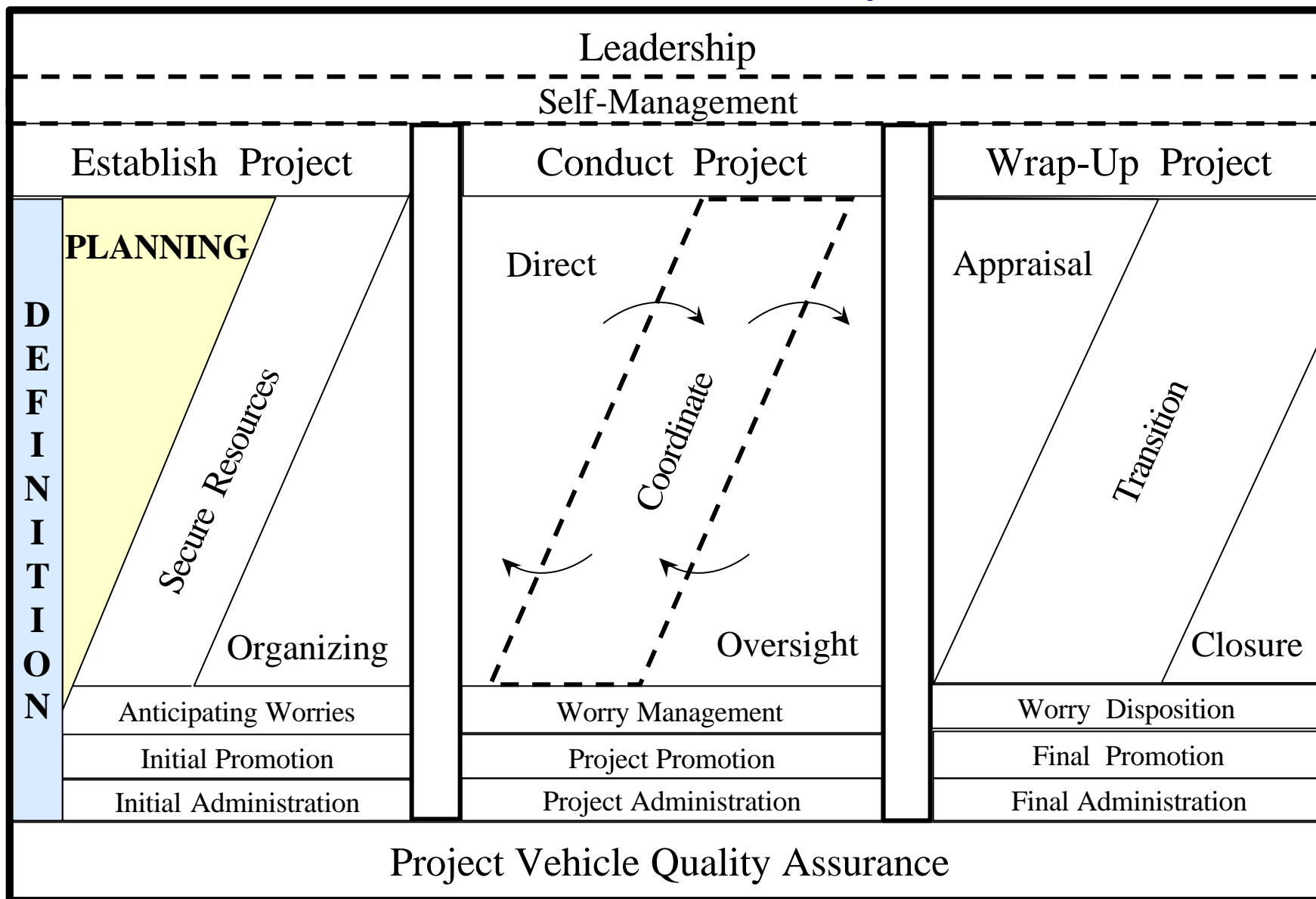
CONTEXT

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

P³R0001.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**

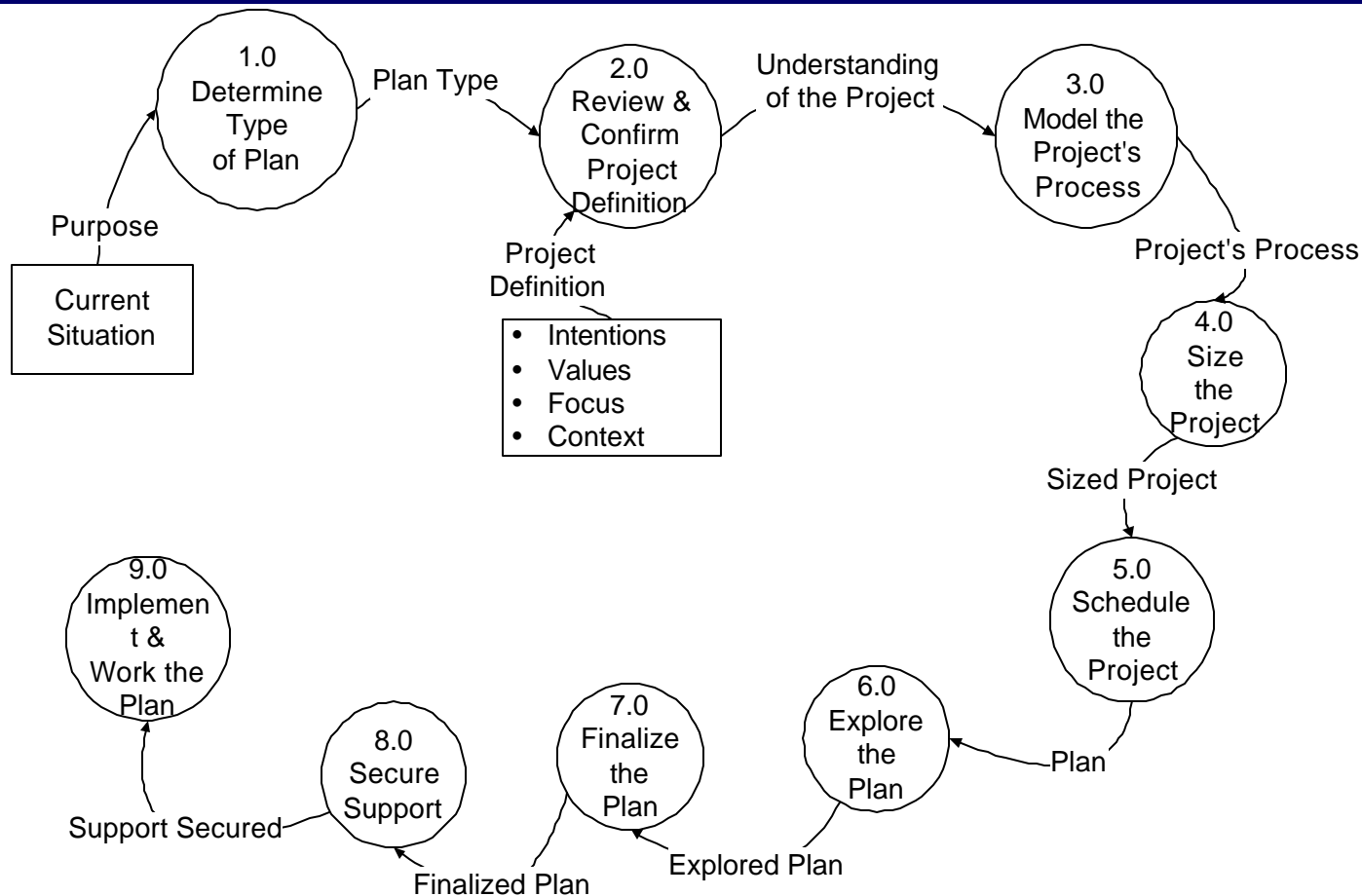
Focus

- ★ **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

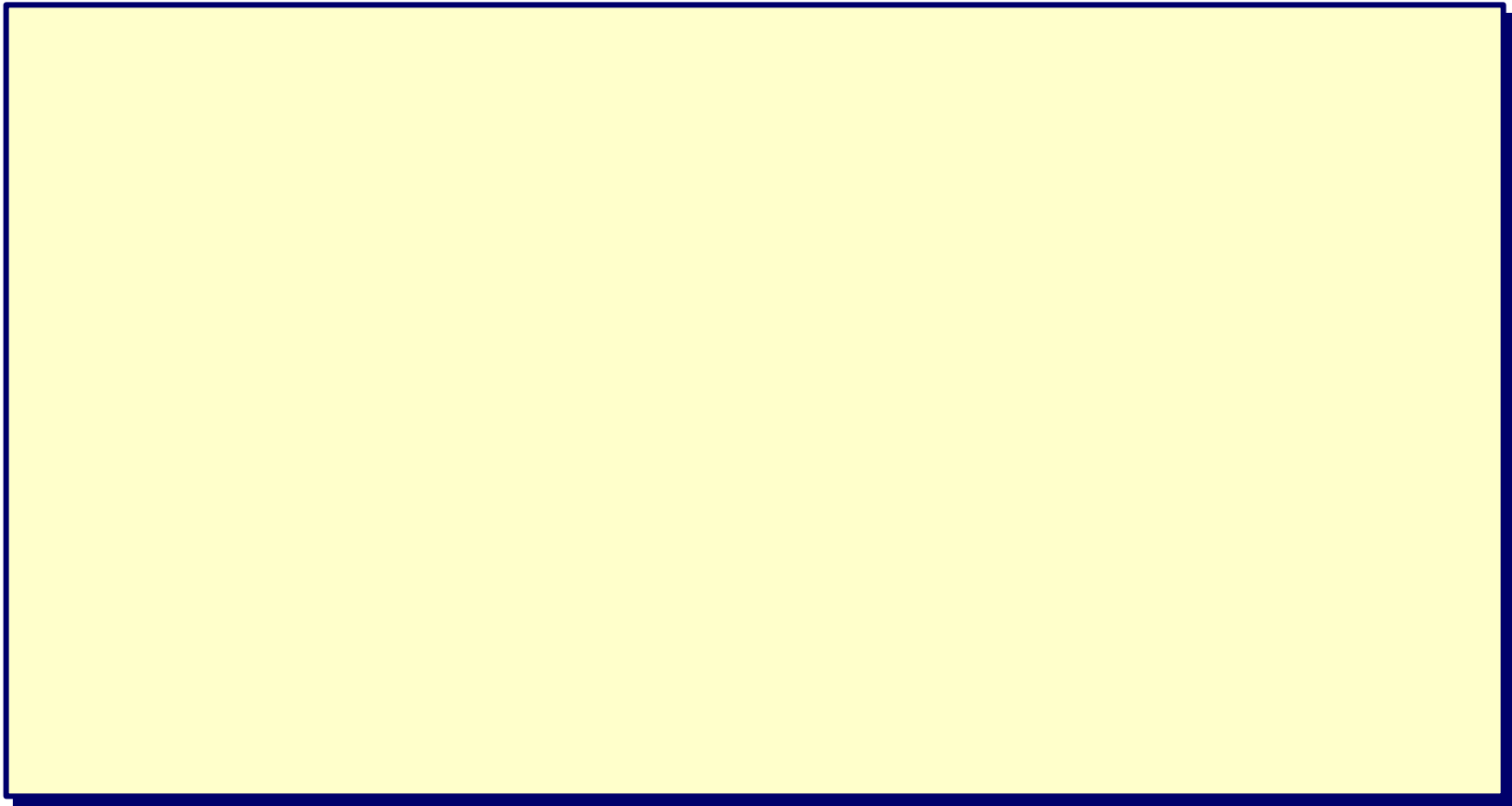
Review and Conclusion

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 JDAsm Sessions

Project Management Coaching

See www.advancedstrategiesinc.com for more details

Conclusion & Questions

Remember the Goal:

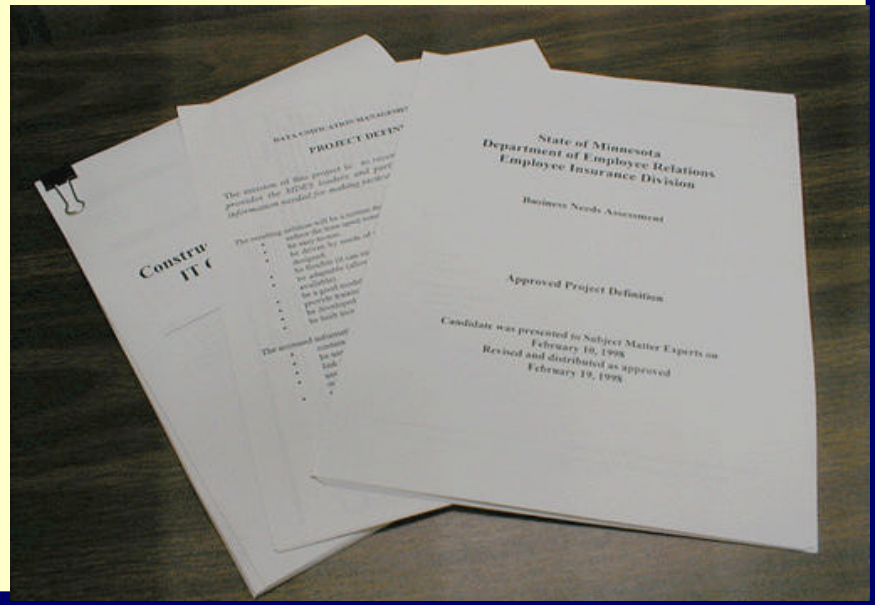
*These techniques will not eliminate
Chaos, Ambiguity, and Lack of Knowledge,
but we have found these help to enable people
to function effectively in spite of these.*



Backup

But Wait... There's More!

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



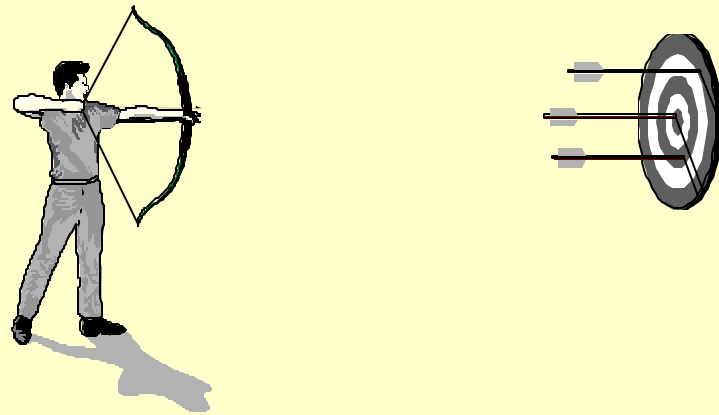
Regarding Change

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).