

Project Planning & Management of ISD and HPT Efforts

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Session Objectives

1. Able to assess your situational context to establish your project planning needs and criteria
2. Able to develop a macro-planning framework for your situational context
3. Able to develop a micro-planning framework to fit your project staffing realities
4. Able to develop management strategies for project monitoring and troubleshooting

But first...

Why bother? - WIIF-Y/YE/YS *

Also Known As: What's In It For Me?

- **Better Outputs**
- **Faster Completion**
- **Cheaper Effort**

*** What's In It For – You/ Your Enterprise/ Your Stakeholders?**

Ready or Not!

1- Assessing Your Situation

- Able to assess your situational context to establish your project planning needs and criteria...
- Can you use a simple *ADDIE-like* macro framework?
- Do you need to integrate with other work-streams in your efforts?
- Do you need to do both?
- Who needs to be included in the plan?
- What would help you to communicate/ to help others translate?
- What are other needs/criteria?

1- Assessing Your Situation

A D D I E

My adaptation of ADDIE...



1- Assessing Your Situation

Another common
macro framework...

Define
Measure
Analyze
Improve
Control

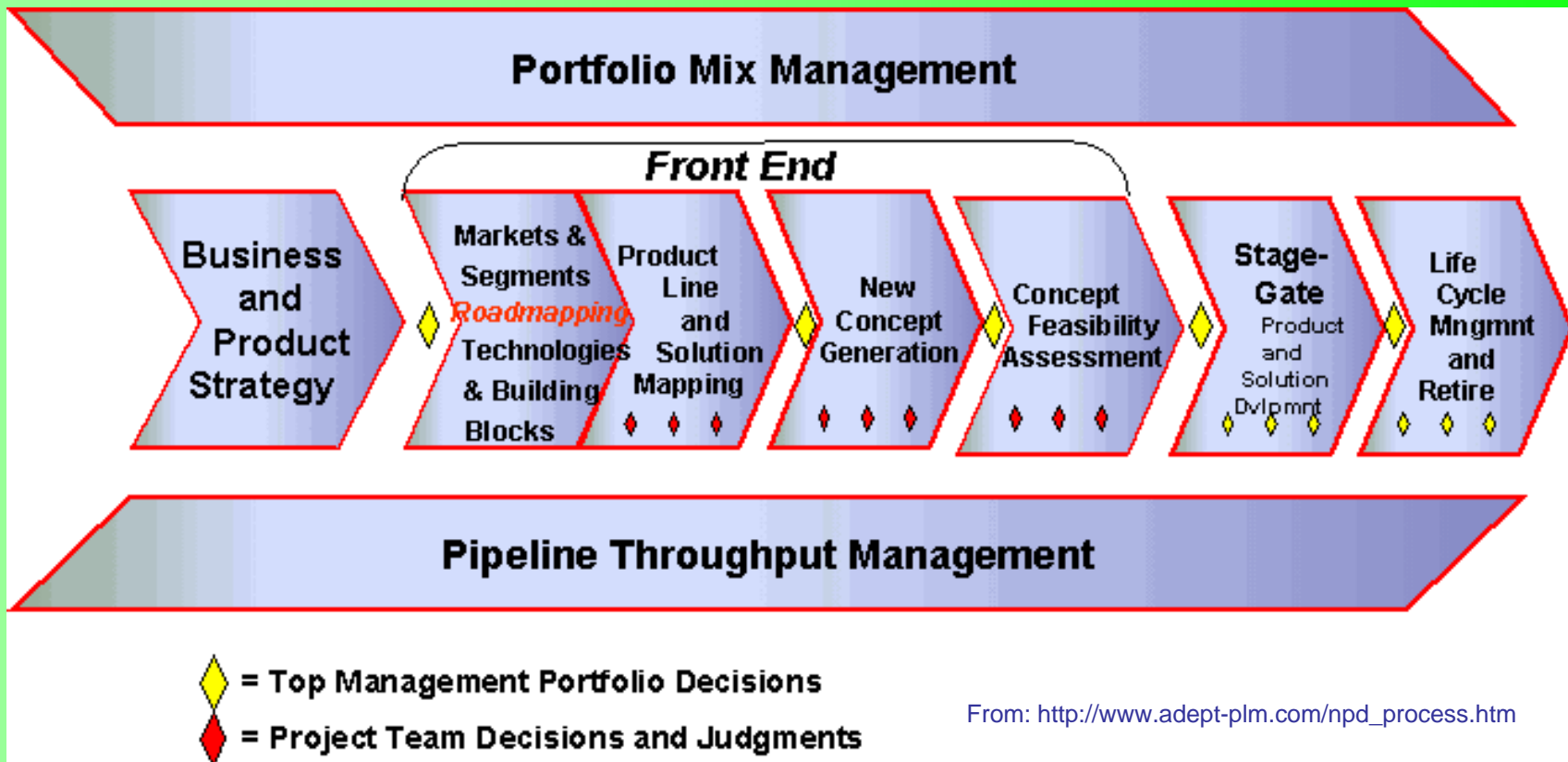
Six Sigma - DMAIC Methodology - from www.isixsigma.com

Phase	Description
Define	<i>Define project goals & customer (internal and external) deliverables:</i> <ul style="list-style-type: none">•Define Customers and Requirements (CTQs)•Develop Problem Statement, Goals and Benefits•Identify Champion, Process Owner and Team•Define Resources and Evaluate Key Organizational Support•Develop Project Plan and Milestones•Develop High Level Process Map
Measure	<i>Measure to determine current performance and quantify the problem:</i> <ul style="list-style-type: none">•Define Defect, Opportunity, Unit and Metrics•Detailed Process Map of Appropriate Areas•Develop Data Collection Plan•Validate the Measurement System•Collect the Data•Begin Developing $Y=f(x)$ Relationship•Determine Process Capability and Sigma Baseline
Analyze	<i>Analyze and determine the root cause(s) of the defects.</i> <ul style="list-style-type: none">•Define Performance Objectives•Identify Value/Non-Value Added Process Steps•Identify Sources of Variation•Determine Root Cause(s)•Determine Vital Few x's, $Y=f(x)$ Relationship
Improve	<i>Improve the process by eliminating defects.</i> <ul style="list-style-type: none">•Perform Design of Experiments•Develop Potential Solutions•Define Operating Tolerances of Potential System•Assess Failure Modes of Potential Solutions•Validate Potential Improvement by Pilot Studies•Correct/Re-Evaluate Potential Solution
Control	<i>Control future process performance.</i> <ul style="list-style-type: none">•Define and Validate Monitoring and Control System•Implement Statistical Process Control & Determine Process Capability•Develop Standards and Procedures•Develop Transfer Plan, Handoff to Process Owner•Verify Benefits, Cost Savings/Avoidance, Profit Growth•Close Project, Finalize Documentation, Communicate, Celebrate

1- Assessing Your Situation

Another common macro framework...

NPD – New Product Development

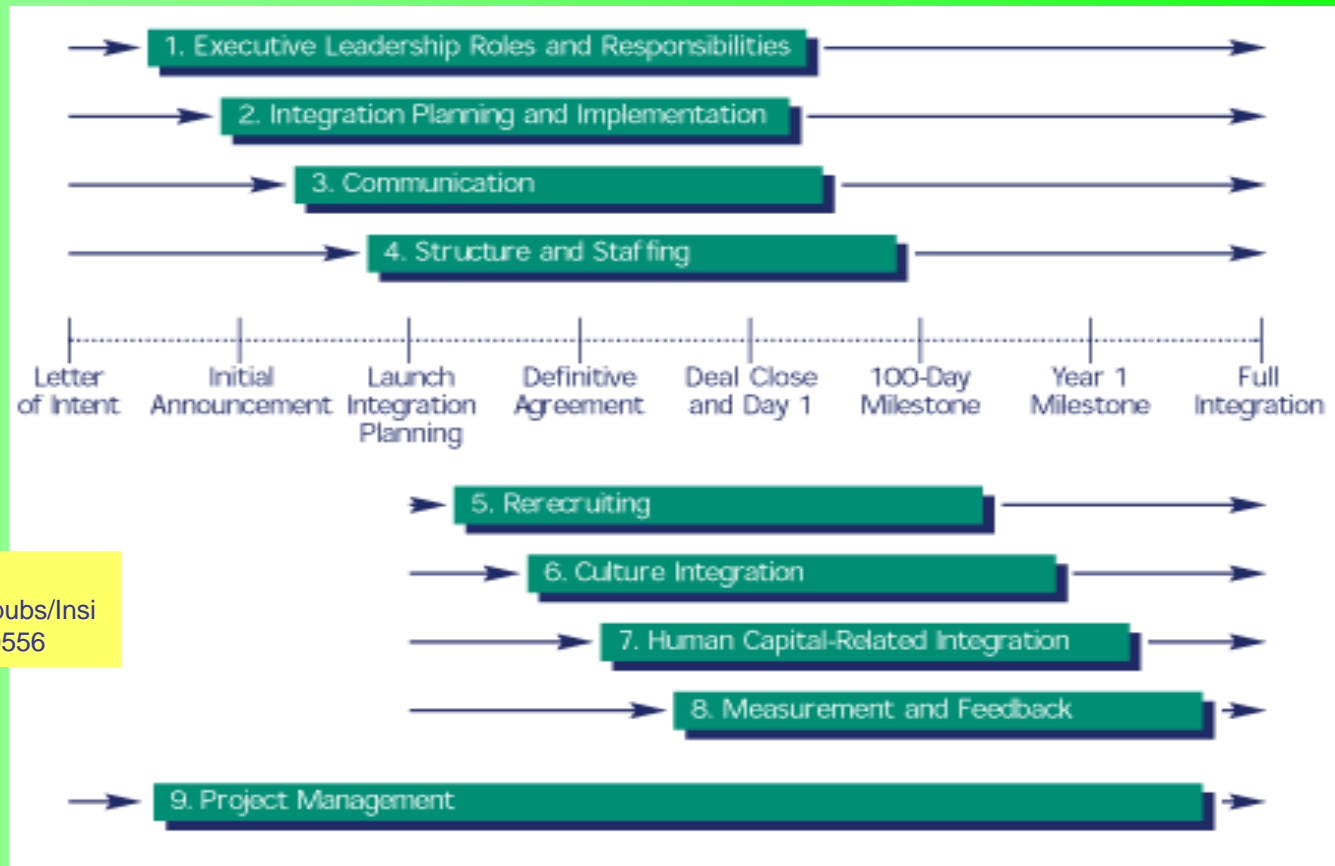


From: http://www.adept-plm.com/npd_process.htm

1- Assessing Your Situation

Is Your Situation
this Complex?

Complex work-stream efforts model



From:
<http://www.watsonwyatt.com/us/pubs/Insider/showarticle.asp?ArticleID=10556>

1- Assessing Your Situation

What do you have to tie into?

What would be “smart things” to do?

- Borrow frameworks from elsewhere?
- Borrow language/terms?
- Borrow visuals/imagery?
- What else should you/ could you borrow and adopt - and/or adapt?

1- Assessing Your Situation Exercise

Use the exercise guidelines in your handout

On your own—take 3 minutes to quickly answer the questions about your situational needs and criteria for your project/ effort planning...

Exercise Readouts and Debriefing

2- Developing a Macro-Framework

- Able to develop a “macro” planning framework for your situational context
- Developing a simple macro framework such as ADDIE or DAMAIC
- Developing an integrated macro framework with “other work-streams”

2- Developing a Macro-Framework

- Adapt ADDIE – or some equivalent – or use what you’ve got!

For example...my adaptation of ADDIE...

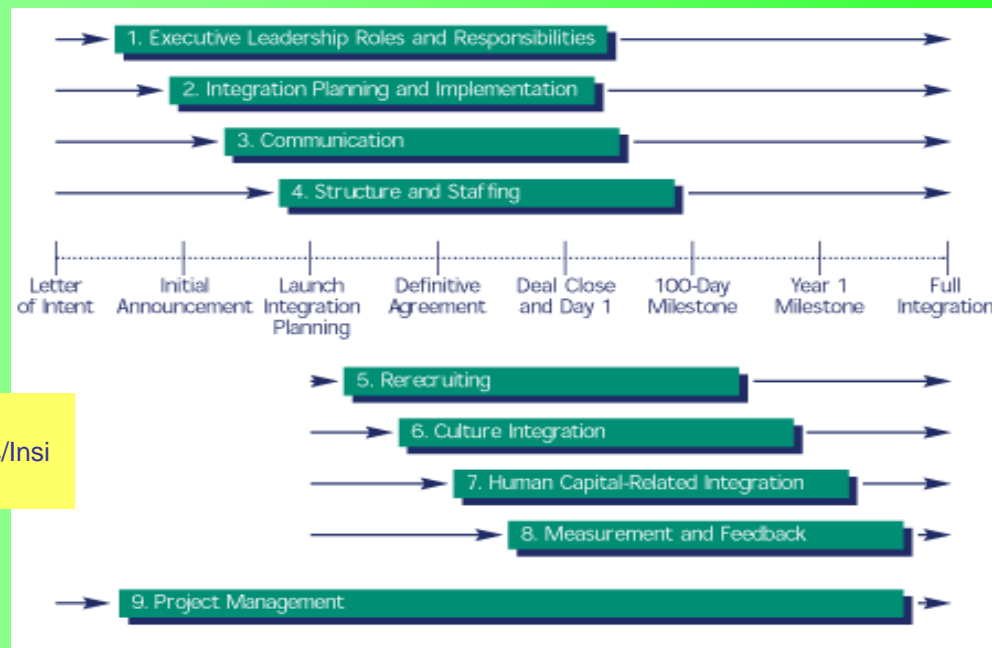


From: The PACT Processes – covered in “lean-ISD”

2- Developing a Macro-Framework

You may or may not need to think about...

- Developing an integrated “macro” framework with “other work-streams”



From:
<http://www.watsonwyatt.com/us/pubs/Insider/showarticle.asp?ArticleID=10556>

2- Developing a Macro-Framework Exercise...

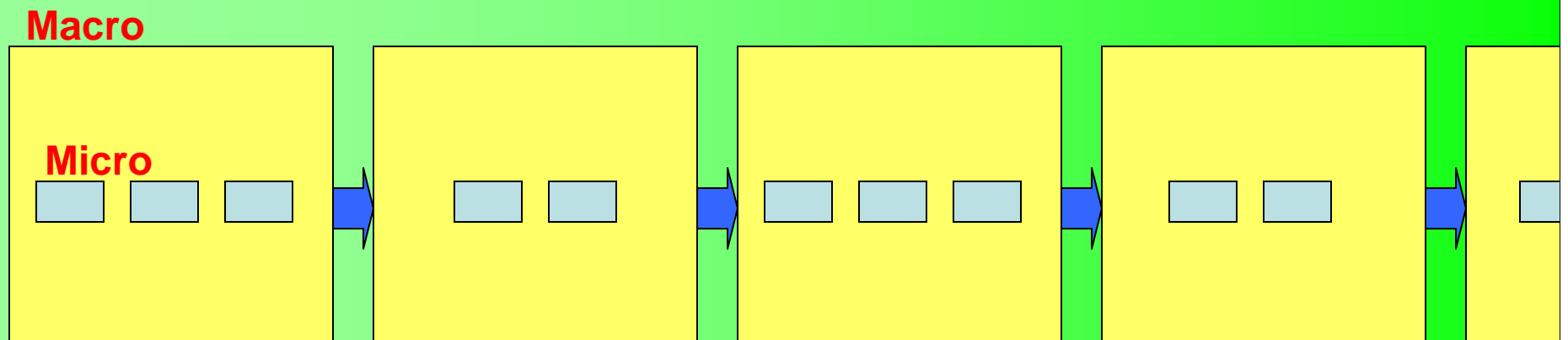
Use the exercise guidelines in your handout

- **Draw your Macro Framework for simple efforts**
- **Draw your Macro Framework – if needed – for complex, integrated efforts**

Exercise Readouts and Debriefing

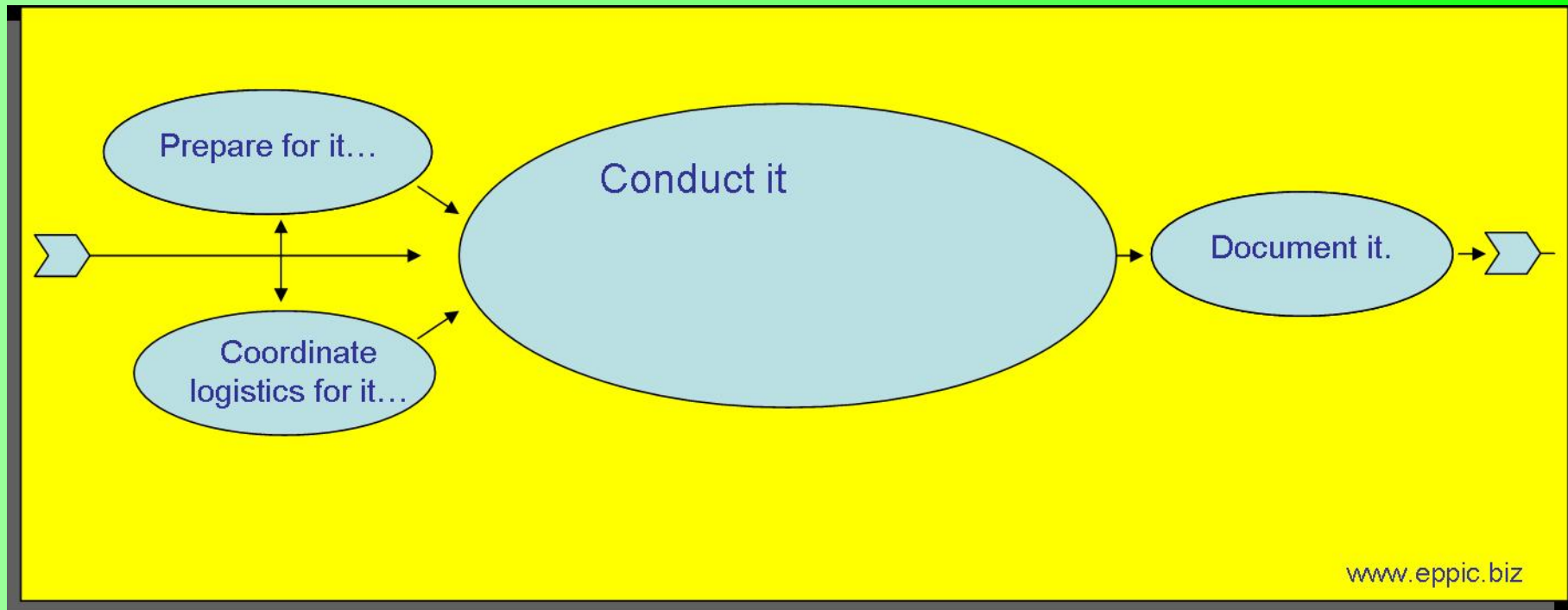
3- Developing a Micro Framework

- Able to develop a micro planning framework to fit your project staffing realities
- **These are the framework/ patterns *within* the big blocks of your macro-framework**

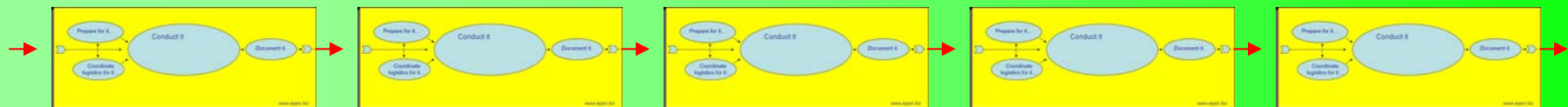


3- Developing a Micro Framework

This is my “micro” activity-set/ block/ framework



A project/ effort is a chain of “Activity-sets” - in series - and/or in parallel...



3- Developing a Micro Framework

Project Planning Cycles for Major Task: Phase - ____ - Task #s ____ to ____
Major Task-set: _____

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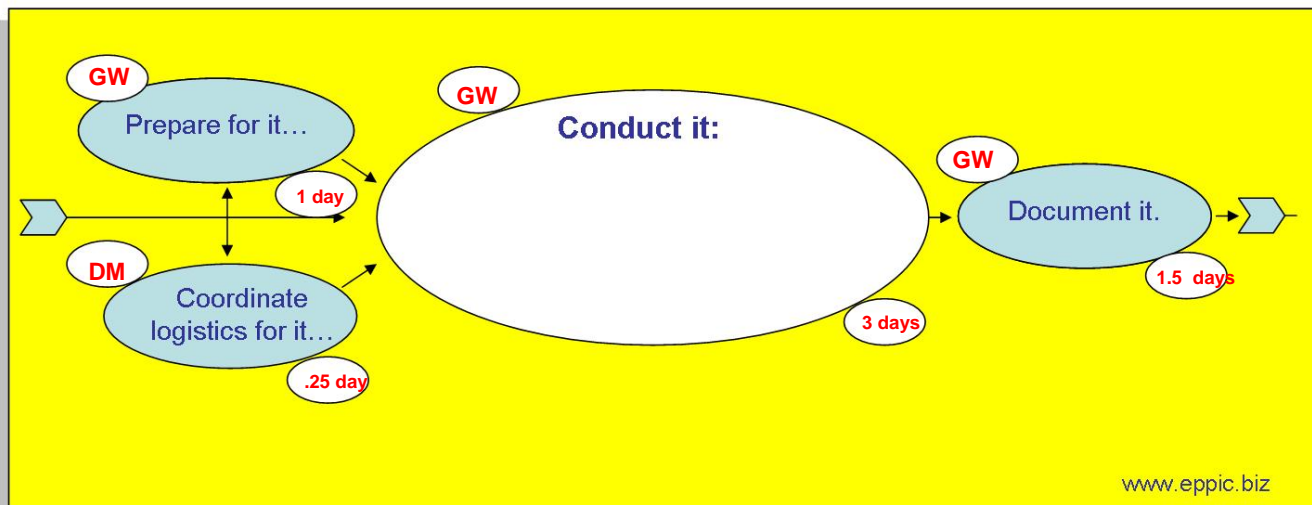
Touch Time Totals	
Person 1:	_____ : _____
Person 2:	_____ : _____
Person 3:	_____ : _____
Cycle Time:	_____

Notes:

1. Prep for it
2. Coordinate logistics for it
3. Conduct it
4. Document it

3- Developing a Micro Framework

Project Planning **Cycles** for Major Task: Phase - ____ - Task #s ____ to ____
 Major Task-set: _____



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Touch Time Totals

Person 1: **GW** : **4.5 days**

Person 2: **DM** : **.25 days**

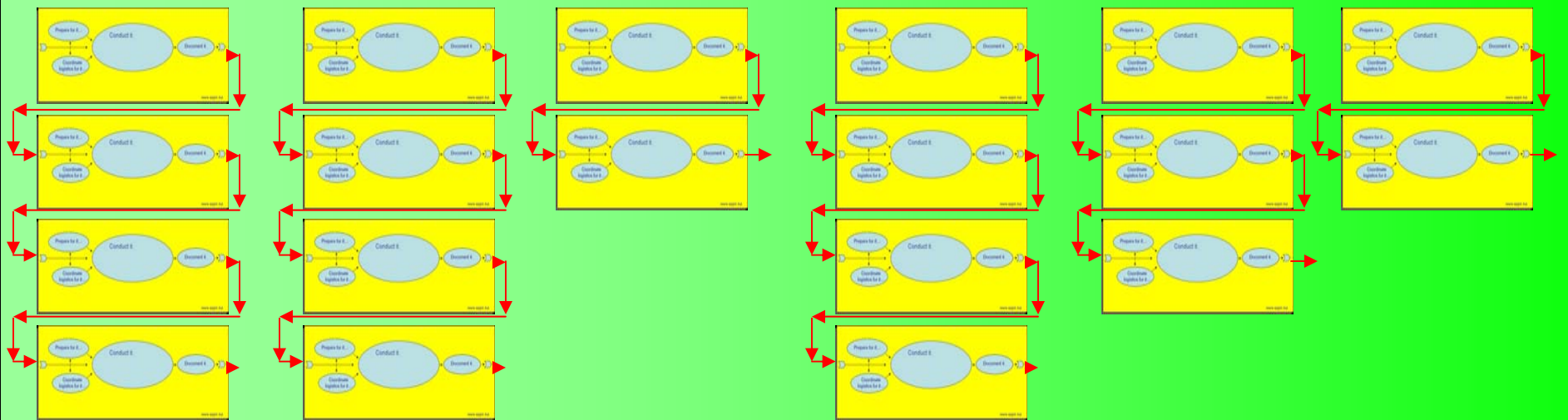
Person 3: _____ : _____

Cycle Time: **7 days**

Notes:

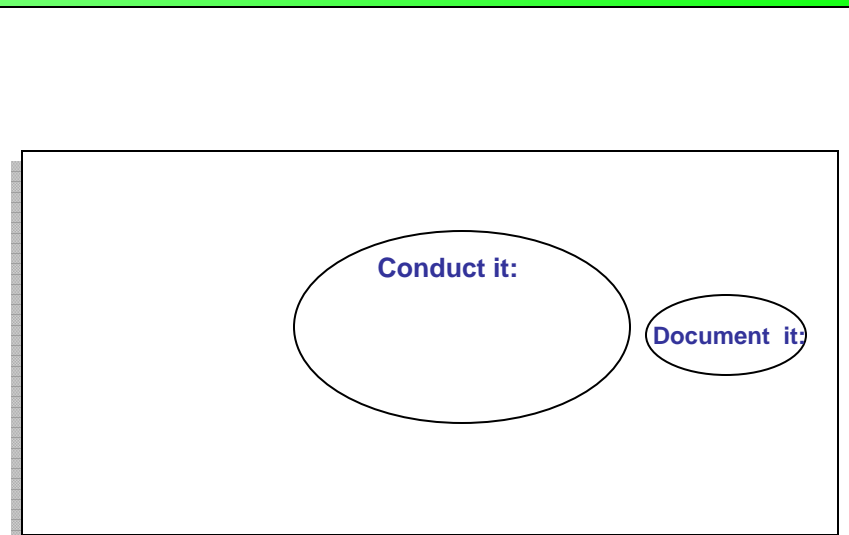
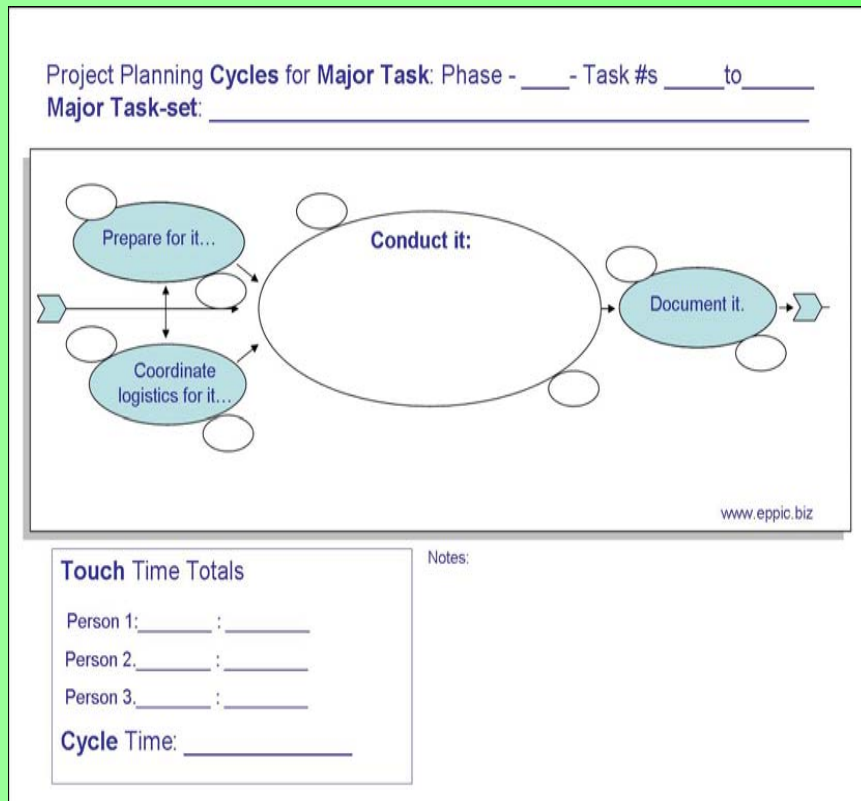
Who – and how much touch time required – and how much time given to touch = cycle time.

3- Developing a Micro Framework



3- Developing a Micro Framework

How would you need to adapt this “micro” framework?



How many “players” are typical?

How do you typically break-out the discreet tasks? Do you need to?

3- Developing a Micro Framework Exercise

Use the exercise guidelines in your handout

Adapt the Activity Block Diagram to meet your needs and criteria.

Exercise Readouts and Debriefing

4- Project Management Strategies

- Able to develop management strategies for project monitoring and troubleshooting

- What would you need to monitor for – or to possibly troubleshoot?

4- Project Management Strategies

- **Monitoring via Statusing Reports and/or Meetings/ “Gate Reviews”?**
- **Monitoring via Walking Around/ Talking with “project/ effort” participants and stakeholders?**
- **Other approaches? How do you do this now?**

4- Project Management Strategies Exercise

Use the exercise guidelines in your handout

**What strategies and tactics
would you apply – and
why are they appropriate
in your context?**

Exercise Readouts and Debriefing

Guy sharing...

Free Resources in Cyberspace

At:

www.eppic.biz

- See the Resource tab – many, many resources

At:

www.guywallace.wikispaces

- See the Free Books & Resources page – many, many resources

At:

www.Pursuingperformanceblog.blogspot.com

- Search on: **planning** – many, many Posts

The 5 P's of Planning – author unknown

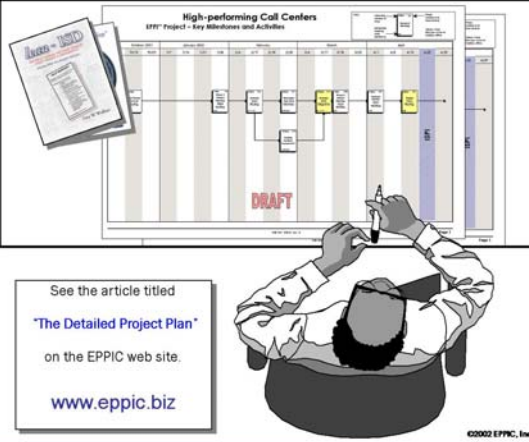
Smart thinking:
Your inability to plan and anticipate should not wreck my plans... but I have planned for it anyway.
Never forget: Murphy lives!

P1- Proper
P2- Planning
P3- Prevents
P4- Poor
P5- Performance

High-performing Call Centers
EPPIC Project - Key Milestones and Activities

DRAFT

See the article titled
"The Detailed Project Plan"
on the EPPIC web site.
www.eppic.biz



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Thank You *and* Good Planning!

- Please complete the *session evaluations* and leave them at the table by the door
- Catch me in the hallways - or contact me later with any of your questions/ comments/ concerns...

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Have a Great Conference!

