What is a Project Plan?

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For many managers, the answer to the title's question is a task plan: a document or spreadsheet that captures a set of tasks required to produce desired deliverables or outcomes, with assigned task owners and desired due dates.

This is partially correct. Project professionals call this type of plan a Work Breakdown Structure (WBS). Many managers have adopted this type of plan, in particular with their adoption of Microsoft Project and other project management tools that allow managers to lay out who will do what, and when, to produce a deliverable or outcome.

But a WBS by itself does not guarantee that the right outcomes will be delivered at the right times, with the optimal impact. The WBS is a tactical action plan. The project planning document that should precede the WBS is a strategic plan that sets context for funding the project, including why a project is being pursued. This sort of plan is the Project Brief.

| There are 4 uses for a Project Brief

- **Defining** the business context, desired outcomes, cost (money and time), and impact of a project, as well as how and when, at a high level, the outcomes will be achieved

- **Prioritizing** projects, and selecting projects for funding and resourcing

- **Communicating** objectives of selected plans, and aligning teams and team members

- **Defining** and scoping a project to be executed by a third party

The Project Brief is a strategy document that, once finalized and approved, remains static. The Task Plan can be defined entirely in advance of a project starting, but rarely do the tasks and dates remain constant. The Task Plan helps to plan a project, but it's also used for tracking progress and managing changes during product execution.

In summary, the answer to the title's question has two parts: a strategic Project Brief, and a tactical Task Plan. The following descriptions of both can be used as templates.

Part 1 - The Project Brief (Short Version)

Of course, projects vary in scope, cost and impact. Small projects (for example, requiring only 1-2 resources, with a duration of <1 month) don't need a full project brief - though it's always helpful to have some context on such investments. Very large projects (e.g., multiple resources, duration > 6 months) may require a Project Brief with much more detail than what's shown here.

The version of the Project Brief in this section is for a typical mid-sized project that involves, say, 3 or more team members, lasting 3-6 months. A template for larger projects that includes all the sections in the Short Version plus more detailed sections, is described in the Appendix.

Project Brief Section	Description
Business Context and Problem Statement	A short paragraph at the start of the Project Brief serves as an executive summary. Its purpose is to set the stage and identify the motivation for the project. A problem statement, or identification of what challenge will be overcome, is especially effective at setting context for the project.
Project Sponsor and Owner	The executive sponsoring the project must be identified, as well as the manager responsible for managing and delivering the project.
SMART Goals	Goals often suffer from being abstract and unrealistic, which in turn makes the goals hard to achieve and, when finished, unclear if they were actually achieved. Crafting goals that are SMART avoids this issue: **Specific:** define all goals that the project will address concisely and with clarity **Measureable:** identify the metrics that should be impacted by the work, with benchmark and target values **Agreed:** get approval and buy-in from stakeholders **Realistic:** define goals that are achievable, especially with the resources and the time available **Time-based:** identify a specific date when the goals will be achieved The Goals section should include a summary of the overall impact of the project that includes both qualitative and metrics-based impact, especially financial impact. The goals, and in particular the summary, can be used to create a short business case for the project at the end of the Project Brief, after the Project Cost section.
Approach	A short paragraph describing how a project will be executed creates clarity on ownership of the project, resource assignments, and impact on other work.

Project Brief Section	Description
Scope and Not in Scope	Scope is defined by the Goals (above), and is fleshed out with the Phases and the Deliverables, described below. A short narrative paragraph summarizing the scope can help set context for the fleshed out definition. Importantly, the scope section should also identify what is <u>not</u> scope. Identifying what's out of, scope preemptively prevents scope creep during the project.
Phases and/or Workstreams with Due Dates	Defining the Phases of a project in the Project Brief begins defining how the work will be executed, and, with due dates, in what time frames. A phase is a logical set of work that is distinct from other sets of works to be done in the project. The term Phases implies that the sets of work should be executed in order, one phase after another. But that isn't always the case - for some projects, the sets of work should be planned and executed in parallel, or overlapping in time. In those cases, Phases can also mean Workstreams.
Deliverables	Deliverables are the outputs of the work. Deliverables should be defined within the Phases and Workstreams. To help define the scope of the project, the Deliverables that will <u>not</u> be produced should also be identified.
Resources	This section should identify the roles required to deliver the project; how time is required for each role, and when; and the people who will serve in each role. Importantly, identifying the Resources requires sign-off by the manager of each project participant, so each team member is allocated sufficiently to the project.
Estimated Costs	Finally, all financial outlays associated with the project should be identified. The Costs estimates can include the labor cost, as derived from the Resource Assignments.

As noted, a full Project Brief, applicable to larger, more costly projects, is provided in the Appendix. The full Project Brief includes descriptions of Risks, Dependencies, Communication Plans, and other project planning elements.

Part 2: The Work Breakdown Structure, aka Task Plan

A task plan has 3 components:

- A definition of the work, broken into elemental parts, organized in a hierarchy

- An owner for each work element

- A date when each element will be completed

A basic task plan looks like this:

Work Element	Owner	Due Date
Phase, Workstream or Deliverable 1	Joe	1/31
Task 1.1	Jane	1/31
Sub-Task 1.1.1	John	1/15

Some key points about this basic task plan:

- The hierarchy can have as many layers as needed; e.g., the work of a sub-task can be further broken into sub-sub-tasks.

- Due dates are driven bottom up; i.e., the due date of a phase is driven by the latest date of the tasks, which in turn is driven by the latest due date of the sub-tasks.

- The owner of higher order elements may not perform any work, but those owners are responsible for the completion of the work. Assigning managers and executives as owners in the Task Plan creates executive buy-in to the execution of a project.

Other work elements can be included in the Task Plan:

- **Milestones** are events, with due dates but not owners, that identify when a set of work must be completed. For example, for a project of exhibiting at a trade show, a milestone can be "Last day for receiving booth materials at show location." Note that a milestone can also be the due date of a Deliverable.

- **Stage Gates** are decision points in a project. For example, a stage gate for exhibiting at a trade show can be "Approval of booth design."

- **Budgeted Hours and Budgeted Costs** are estimates of what will be expended in time and money on work elements. Defining these numbers identifies how much time will be needed for each team member, and calculates overall cost of the project.

- **Task Dependencies** show that one task can't be started until another task is either started or completed. Dependencies create relationships between work elements across Phases, Workstreams, Deliverables and Tasks, to ensure that work across the project is completed in the right order, and in time.

- **Critical Path** - by identifying all task dependencies within a project, the Critical Path are the tasks that define the duration of a project. Any slippage in delivery of a task on the critical path means that completion of the project will be delayed.

Appendix: The Project Brief, Full Version

The Project Brief described above is appropriate for typical mid-sized projects. For larger initiatives, more strategic planning is usually necessary, and can be captured in additional sections in the Project Brief, as described below. The text in black font is the same as the short version of the Project Brief; the new sections with the full version are highlighted in blue font.

Project Brief Section	Description
Business Context and Problem Statement	A short paragraph at the start of the Project Brief serves as an executive summary. Its purpose is to set the stage and identify the motivation for the project. A problem statement, or identification of what challenge will be overcome, is especially effective at setting context for the project.
Project Sponsor and Owner	The executive sponsoring the project must be identified, as well as the manager responsible for managing and delivering the project.
Gap Analysis: Current vs Desired State	The business context can be augmented with an analysis of what an ideal state would look like and why that state would be good (e.g., metrics that would be attained), compared to the current state of affairs and why it's bad. The current state fleshes out the problem statement, identifying the extent of each problem that needs to be addressed, including the sources and the manifestations of each problem. The Desired State sets context for the SMART Goals, by articulating what needs to be achieved.

Project Brief Section	Description
SMART Goals	Goals often suffer from being abstract and unrealistic, which in turn makes the goals hard to achieve and, when finished, unclear if they were actually achieved. **Crafting goals that are SMART avoids this issue:** **Specific**: define all goals that the project will address concisely and with clarity **Measureable**: identify the metrics that should be impacted by the work, with benchmark and target values **Agreed**: get approval and buy-in from stakeholders **Realistic**: define goals that are achievable, especially with the resources and the time available **Time-based**: identify a specific date when the goals will be achieved The Goals section should include a summary of the overall impact of the project that includes both qualitative and metrics-based impact, especially financial impact. The goals, and in particular the summary, can be used to create a short business case for the project at the end of the Project Brief, after the Project Cost section.
Feasibility / Capability Analysis	With the Context defined and the SMART Goals identified, focus can then turn to execution. A Feasibility Analysis that includes an assessment of current capabilities helps to identify the organization's ability to achieve the Desired State and Goals. The Feasibility study can include an assessment of the skills available to achieve the goals, as well as an assessment of the capacity of the organization to deliver the change necessary for achieving the goals..
Alternative Approaches	Related to the Feasibility analysis is identifying approaches to achieving the goals. Radical ideas, such as outsourcing the work or achieving goals through acquisition, should be considered. Ultimately this analysis helps clarify which approach to achieving the Goals is optimal.
Approach	A short paragraph describing how a project will be executed creates clarity on ownership of the project, resource assignments, and impact on other work.

Project Brief Section	Description
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Resources	This section should identify the roles required to deliver the project; how much time is required for each role, and when; and the people who will serve in each role. Importantly, identifying the Resources requires sign-off by the manager of each project participant, so each team member is allocated sufficiently to the project.
High Level Dependencies	While the Work Breakdown Structure identities task-level dependencies within project execution, Dependencies in the Project Brief should be high level. Dependencies can be internal, such as the completion of related, preceding project, or external, such as certain market conditions being in place to warrant the project's execution.
Risk Analysis	Similar to the Feasibility analysis, Risk identification should be free-ranging, to be clear-eyed about any and all risks, no matter how far-fetched, could impact the success of a project. For each risk identified, the likelihood and the impact should be quantified, and a mitigation plan sketched out.

About GoMo

GoMo Consulting is a specialty practice focused on delivering projects for our clients in the domain of go to market (i.e., Marketing and Sales). Our project managers and business analysts augment client teams to create alignment, develop plans, execute relentlessly, and deliver impact. Our disciplined approach has led to successful projects for clients such as Microsoft, Cisco, VMware, Avaya, PayPal, Visa, MongoDB, and many others.

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