

## Scoping & Planning a Project in a Day

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## Preliminaries

### What is it?

Exactly as it says on the tin. It is possible to scope and plan a project – even very large ones – in a day.

### Really?

Yes. You can be skeptical about this if you like but we've done it for organizations such as Interxion, the European Commission, Teamsoft, Bank of Ireland, Clinical Grid, Davy Stockbrokers, Elan, Ulster Bank, Coca Cola, EPC, Eastern Health Shared Services, Special Olympics World Games 2003, National Grid, Douglas Wallace, Irish Cervical Screening Programme, Anord, Repak (Ireland's 5-year Recycling Strategy), Valista, Motricity, Programme of Action for Children and Stryker.

At least three of the projects involved have been mergers of two companies. The Special Olympics World Games 2003 was planned by repeated applications of this technique. ETP helped Coca Cola to plan a 700 man-year project using this technique.

'We got ETP to use this technique for us on two mission-critical projects. I was very skeptical that this could be done in a day but I was there – I saw it with my own eyes. This stuff works.'

- Raomal Perera

*Former CEO, Valista; Serial Entrepreneur & Professor of Entrepreneurial Studies at INSEAD*

### How does it work?

Essentially, there is a 1-day session in which the plan is built. Project stakeholders have to do some preparation before the 1-day session and there is some follow-up afterwards.

This module

- Describes what preparation has to be done by participants in advance of the 1-day session and gives samples of the materials to be sent to them.
- Gives templates for the documents to be built during the scoping and planning session.

- Explains exactly how to run the 1-day session. This includes the timings for the day and detailed notes on how to keep the session running to schedule while still ensuring that the work is done properly.
- Describes the follow-up to be done afterwards.

### What are the deliverables from Scoping & Planning a Project in a Day?

- A clear definition of the project deliverables and key milestones
- The delivery date and schedule
- The effort and budget required
- Quality measures
- Project management responsibilities clearly defined
- A reporting structure
- A communication plan to keep the stakeholders up to date with project progress
- The principal assumptions on which the project is based
- Gantt Chart to graphically outline the project lifecycle
- Risks identified and appropriate actions identified to minimize risks
- Any other findings and recommendations.

### What's the alternative to a Scoping & Planning a Project in a Day?

If you don't scope and plan the project in a day, the alternative goes something like this:

1. Somebody identifies some kind of need or requirement or problem that needs to be solved
2. Based on this somebody does some ferreting around and then writes a proposal / business case / specification
3. This is reviewed by the stakeholders and the reviews are fed back to the author of the document
4. There are updates to the document, plus perhaps flurries of e-mail exchanges, phone calls and meetings to resolve various issues
5. Items 3 and 4 get looped around a number of times until finally ...
6. There is agreement on what is to be done
7. Then somebody is charged with building a plan
8. That somebody does some ferreting around and then writes a plan
9. That plan is reviewed by some or all of the stakeholders and the reviews are fed back to the author
10. There are updates to the plan, perhaps more e-mails, phone calls and meetings – particularly if there is a gap between what the stakeholders want and what the project team say is possible.
11. Items 9 and 10 get looped around a number of times until finally ...

12. There is agreement on the plan.

This process can take weeks ... months ... years, in some cases.

As an alternative to all of this carry on, you can scope and plan the project in a day.

### You don't have to take our word for this

In their book, *Developing Products in Half the Time*<sup>1</sup>, the authors Smith and Reinertsen refer to the beginning of the project as 'the fuzzy front end'. They say this: 'Time is an irreplaceable resource. When a month of potential development time is squandered, it can never be recovered ... each month of delay has a quantifiable cost of delay. Our goal as developers is to find opportunities to buy cycle time for less than this cost. These opportunities, large and small, appear throughout the development process. There is, however, one place that we could call the 'bargain basement' of cycle time reduction opportunities. It is the place that we consistently find the least expensive opportunities to achieve large improvements in time to market. We call this stage of development the Fuzzy Front End of the development program. It is the fuzzy zone between when the opportunity is known and when we mount a serious effort on the development project.'

If the 'fuzzy front end' is where 'opportunities to achieve large improvements in time to market' are greatest, then scoping and planning a project in a day is way of maxing out those opportunities.

Projects can often be very start-stop in nature. We do some stuff and then we have to wait, for example, for reviews, or approval or for input from other people. Nowhere is this truer than in the fuzzy front end. Everyone believes they have something to contribute, lots of people want 'signoff', and there are always those who feel that their input is being ignored. At the same time, because the project hasn't really yet gotten off the ground, there are always a million and one things more immediate and pressing. The net result of all of this can be a long and frustrating period while requirements are identified, nailed down and agreed. We can circumvent all of this by concertina-ing them into one decisive, devastatingly effective event using **Scoping & Planning a Project in a Day**.

### Benefits

The benefits of this approach are:

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<sup>1</sup> *Developing Products in Half the Time: New Rules, New Tools*, 2nd Edition by Smith, Preston G., Reinertsen, Donald G., Wiley (1997)

- ✓ Projects launched in a day. The project is actually running by the end of the day. There is no quicker and more cost-effective way to begin a project
- ✓ Clear project objectives, project requirements and agreement / buy-in on these from the stakeholders
- ✓ Accurate estimates upon which firm commitments can be made
- ✓ A clear picture of how the project will unfold
- ✓ A kick-start to the project.

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