

# Project Planning Workshops (PPW)

by Alexander Walton, PMP, NPD SIG Chair

## History

During the past twelve years, over a thousand Project Planning Workshops (PPWs) and its derivatives Project Acceleration Workshops (PAWs), Project Startup Workshops (PSWs), and Project GO!s were conducted for a wide variety of projects. The workshops ranged from four hours to three days in duration. Project leaders, team members and sponsors considered them very cost-effective approaches to planning, especially for cross-functional teams.

Having initiated the process, facilitated a majority of the workshops for the first three years, mentored new facilitators, and integrated the practice with process improvement efforts, this article is written to expose others to their benefits and techniques.

## The PPW Technique

The PPW is an effective facilitated planning technique for teams to develop or refine their project scope, strategy, work breakdown structure (WBS), risk plan and schedule in a systematic way (Figure 1). The PPW is a concurrent planning style which provides a framework for developing an integrated plan that is well understood and “bought in” by team members, team building and project management concepts training:

## Benefits of a Concurrent Planning Style like a PPW

- Inherent team building
- Team buy-in
- Team calibration
- Risk identification
- Critical path analysis
- Hand off identification
- A detailed schedule
- Project management process followed

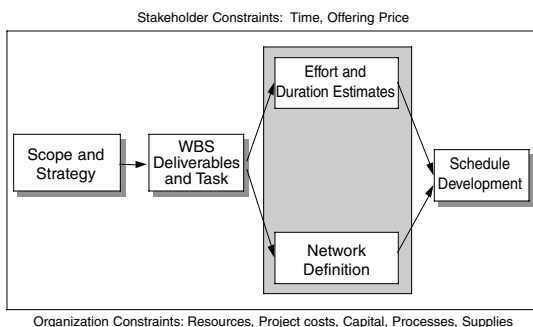


Figure 1: Planning Steps

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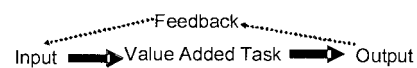
## Planning a PPW

Prior to a PPW the team leader and sponsor develop draft materials-scope statement and WBS deliverables. Sometimes project strategies and a beginning list of project risks and constraints are included. These draft materials provide the initial inputs for the PPW. Core team or optimally all team members are identified and attend the PPW.

Usually the best place in the NPD cycle for a PPW is around Gate 3 (between detailed investigation and actual development). This will very depending on industry and organization.

## The Gate 3 Process

In its simplest component form:



### Inputs

1. Business Case
2. Project Plan (Draft)
3. Recommendations

### Outputs

1. Project Plan (Approved)
2. Action Items
3. Buy-in
4. Decisions

## The PPW

Starting with draft materials, the team refines the project scope statement, which is a concise description of the project success criteria and key constraints. For most teams the scope statement is the most difficult part and the most satisfying once completed. The next step is always seen as valuable and worth the effort.

Then, project deliverables and associated tasks are identified within a WBS framework. Task tags (Figure 2), or a scheduling tool, are used to document task information - including duration (sometime effort) and assigned resources. The WBS structure and associated task tags are taped to a wall. With a scheduling tool this is projected on a screen. The team then reviews the WBS for completeness and ownership.

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# Project Planning Workshops *Cont.*

Task #: _____		Assumption #: _____	
Task Description: _____		Owner: _____	
Key People: _____			
WBS # _____			
Effort: _____	Duration _____	Est. Start: _____	
Capital: _____		Est. Stop: _____	
Task # _____	(S/F) _____	Task # _____	(S/F) _____
_____	_____	_____	_____
_____	_____	_____	_____

**Figure 2:** PPW Task Tag Form

Once the “what” of the project is defined, dependencies between tasks are added to the task tags. Tags are then taken from the WBS wall and placed on a time line chart or input into a scheduling tool. The team then reviews and resolves schedule and associated scope issues.

## The RADIO List

Throughout the PPW risks, assumptions, definitions, issues, opportunities (RADIO) and constraints are identified and documented with the use of flip charts.

Short segments near the end of a PPW include a review of the RADIO list, a selection of key project risks and a team communications plan. A mitigation brainstorm for the most selected risks is performed.

Other topics added to the agenda are integrated at the right time of the PPW to help assure a great project start or re-start.

Normally, a review of the key results (Scope Statement, WBS top deliverables, overall schedule and key risks) occurs with the project sponsor, to obtain concurrence.

## Project Planning Training

Throughout the PPW key project management concepts are taught in “snippets,” and then the team immediately applies the learning to develop that portion of their plan.

## Documenting the Project Plan

After a PPW, task tag data is transferred to a scheduling tool, if needed, then reviewed and modified by the team. All other information and decisions are organized in the appropriate documentation. This collectively becomes the project plan baseline.

## Lessons Learned

The PPW has been especially useful for cross-functional teams undertaking complex, risky or large projects. However, 30 day efforts have been well served with a four hour version. Lessons learned include:

- Better separation of related projects
- More prep work for background efforts - email
- Too many concurrent issues - group and simplify
- Use the same for the issues, much smaller group to pick and choose and run with decisions
- Hold even earlier in the NPD process
- ID key stakeholder and the first customers of any deliverables up front
- Many issues could be handled prior to the meeting. A short pre-workshop meeting and emails.
- Identify specific people as resources
- Product cost is important to have prior to the meeting
- Send the draft scope prior to the meeting to all participants

Today, most of the PPWs I support are one day in duration with a follow-on half day

## Need More Info?

A more detailed description of the steps and associated facilitation ideas are available from [info@3pmlc.com](mailto:info@3pmlc.com). A survey is being generated associated with this style of project planning. If you are interested in adding questions and participating in the survey please send an email to [info@3pmlc.com](mailto:info@3pmlc.com).



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