



White Paper

Team Planning Template Strategy

Team Based Program Management

Free
Project
Management
Software

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In many project management software applications, planning and execution seldom go hand-in-hand. It's typical that web collaboration software applications are focused on team execution. Meanwhile, MS Project is focused on individual project manager only planning. In MS Project plans, the presence or absence of a feedback loop entirely depends on the people skills (or the lack of it) of the project manager. Most of the time, the plan that the project manager made is unrealistic or unexecutable by the teams tasked to implement it. Without a feedback loop, the project plan is just a piece of paper on the wall that teams cannot execute.

In a modern knowledge economy, PM tools have to adapt. Project managers need to maximize the expertise and skill sets of knowledge workers to drive innovation forward and gain above-average productivity; not only during execution but most importantly during the planning stage. Collaboration must achieve a proper alignment with strategy for projects to derive the maximum benefits.

Significantly, project planning must stabilize with project execution to prevent project failures.

Here's a structured team based program management approach which has been strategically designed into the software. It's a team planning template for projects that rely on teams and a variety of project management tools.

Why Team Planning?

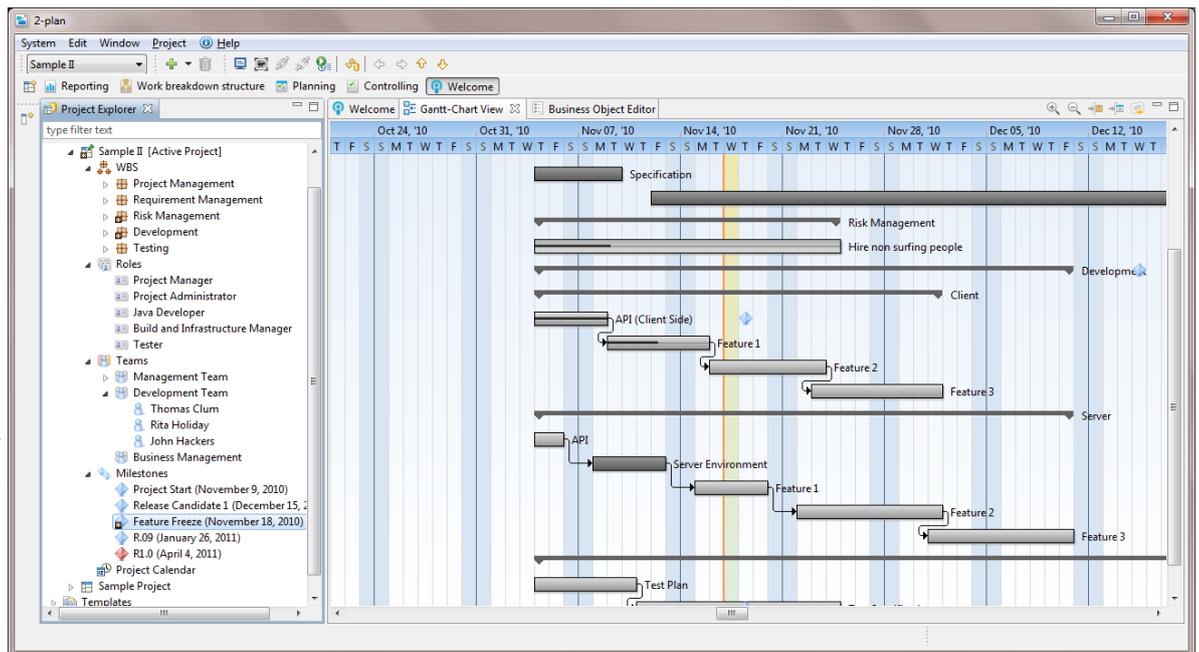
Various studies indicate that team execution among knowledge professionals get better results when these experts are involved in the planning process as a team. Meanwhile, the absence of team planning usually results in project failure and overall job dissatisfaction. Often, this is the main rationale for team based strategic planning.

The benefits of team planning are many. Project owners become better informed for the best decisions at the fastest time. Project stakeholders get

broader and better insights from their operational planning teams. Project managers get stronger commitments from their project staff. Each team member feels greater satisfaction in providing key inputs for a job that he/she does best.

Most significantly, all deliverables, expectations and limitations become clearer and more definite across the board. Miscommunications from the top down or from the bottom up are greatly diminished if not totally eliminated. Executive strategy becomes better aligned with rank-and-file execution across several management layers.

Yes. In this modern age and time, team execution without team planning is already obsolete. Executives and business owners need team planning templates or maybe even a balanced project management tool set with team planning features to drive their organizations forward. The age of the team planning software is here.



TEMPLATE APPROACH. Maximizing Productivity Through Team Planning

Project managers with 10 to more than 15 years of PM experience will have seen a lot of unrealistic time schedules. The problem is usually in the details.

Defining the WBS to set the deliverables and creating a tentative time schedule is fine to establish the baseline. However, when it comes to defining tasks to complete each project deliverable, it makes sense to let project team members define their own. After all, a project manager is an integrator of diverse skill sets-- not an expert in everything.

A team planning template approach like this one facilitates better two-way communication

with teams and gives project managers better perspective on the details of the project. PMs are likely to miss out on key project details most especially in cases where team members are experts in their respective fields. Also, it gives PMs an idea on what their teams can do and how fast they can do it under ideal conditions or in situations that they have not anticipated.

Use the 2-plan Desktop to create the WBS, identify the deliverables, and then create time schedules as the baseline. 2-plan Desktop is a PM tool designed for executives, program managers, project managers and team leaders. When PMs want to start implementing a work pack-

age, they can transfer this item to the 2-plan Team for execution and monitoring or even as an exercise in team planning. 2-plan Team is a PM tool for online collaboration of teams with Smartphone reporting and update tools. Involving each team member in the planning process prior to project execution has its proven benefits among knowledge professionals.

The team, team lead, or the assigned person can detail the tasks in 2-plan Team to complete the deliverable or work package. They can also estimate the time to complete for each tasks. With this



information, a PM will have a very good forecast for the work package. The PM also gets to involve the team early on for better commitments.

In summary, the 2-plan PM tool set triggers team planning when PMs and team leaders transfer work packages from the 2-plan Desktop to the 2-plan Team with the use of the Team Connector plug-in. Meanwhile, feeding back the accumulated values for "estimated time to complete" or "actual working hours" to the 2-plan Desktop drives a speedy and an up-to-date project control and monitoring system. This enables PMs and team leaders do more project management work during project execution instead of doing project management software maintenance work with frequent data entry. The Team Connector essentially transforms two different PM tools into a team planning software.

Consequently, the productivity of teams is better maximized when considering their inputs while the productivity of project managers is increased as they gain more time for crucial PM work like communicating with stakeholders or negotiating with vendors for the material resources and outsourced services that the project needs.

HOW TO USE 2-PLAN FOR TEAM PLANNING. Program Manager's Point of View

Here are some pointers on how to maximize the features of 2-plan Desktop for team based strategic planning prior to connection with the 2-plan Team.

Assign Milestones

In essence, a milestone should represent each deliverable to complete the project. It serves as a marker on where a project is heading at a certain point in time. Ideally, PMs or team leaders should provide milestones for both critical and non-critical project deliverables. The reason for this is to realistically track the progress of the project as taking resources from a non-critical project deliverable to load up a critical deliverable is a common PM practice to beat impending deadlines.

In such a scenario, while a project might seem nearly complete, the actual schedule to complete the project will actually take longer. To prevent such planning blind spots, PMs and team leaders should assign milestones on work packages and their child's accordingly in all project layers.

Here's a simplified explanation on this granularity for this template approach for teams. This is a structured general plan. A big project can consist of medium-sized projects and each medium-sized project will consist of smaller projects. The smallest program management shell layer will take the form of tasks.

For instance, in a four-layered program management scenario, an executive or program manager can assign a milestone each for the mid-sized projects that will complete the bigger project. Down the organizational line, each project manager of an operational planning team can assign a milestone for each small project that will complete his/her own mid-sized project. In the third layer, each team leader that is in-charge of a small project can assign a milestone each for some or all of the tasks that are necessary to complete the project.

Defining milestones using 2-plan Desktop can take on a granular level down to several project layers.

In the four-layered example, the executive or program manager can define the start date or latest finish date in terms of years. Meanwhile, project managers of the operational planning team can plan schedules in terms of quarters. Down the line, team leaders can plan in terms of months while the rank-and-file or project staff can define their tasks in terms of weeks or days.

This planning approach to setting milestones basically aligns executive strategy with execution down to the smallest task with details for hourly up to quarterly periods.

When an executive or program manager uses the 2-plan Desktop to define ballpark figures for the big project and then uses the 2-plan Team to collate and brainstorm on the inputs of his/her project managers,

executive strategy then is aligned down to the department level. Here, the operational planning team is in constant communication with the executive. Taking this further down the organizational hierarchy, each PM of the operational planning team can use the 2-plan Desktop to detail his/her work package and then use the 2-plan Team to collaborate with his/her team leaders in the planning process. In this layer, departmental strategy is now aligned down to the division level through a just-right planning shell.

Finally, team leaders can use the 2-plan Desktop for further detailing of work packages at the task or rank-and-file level. Each team member can then use the 2-plan Team to track time and report progress for each task. Moreover, the Team Connect



tor plug-in can bounce up data for a more efficient project control and monitoring mechanism from the rank-and-file level up to the division level, then from the division level up to the department level. The department level can then finally bounce up project execution data to the executive level.

The strategic assignment of milestones deep into the project layers aligns strategy with execution. Proper scope management and the delegation of project management work are areas that are often ignored or not considered in traditional PM tools. 2-

plan brings balance to this planning deficiency by introducing granular milestones and allowing such milestones to have no dependencies. This is 2-plan's template approach to team planning through the integration of two software applications.

Work Breakdown Structures and Program Management

Several program managers and project management educators point out that many aspiring and entry-level PMs mistakenly assume that the Gantt chart is the WBS. Hence, lesser experienced PMs treat work breakdown structures as tasks and activities with schedules. This point of view has several downsides.

Firstly, a set method or procedure kills initiative. A

problem that a project aims to solve has many solutions. Likewise, the opportunity that a project aims to exploit has different approaches.

Secondly, in such an approach, the schedules are usually unrealistic. PMs are apt to chase a task that no longer serves its purpose. Conditions change throughout the duration of a project. A set method or procedure in the ideal project plan prevents adaptation to real-world

project conditions. In project portfolio management, program managers will actually terminate a smaller project right in the middle of its execution before it is even complete. The reasons will range from a lack of project funding to the appearance of a more viable alternative that became known only when the project was already ongoing.

Thirdly, it disregards the expertise of the various project team members with different skill sets. It also forces the project manager to create and detail tasks that he/she absolutely knows nothing

about except for a generalized view. This approach to the WBS erroneously sets tasks that are impossible to execute considering the available material and human resources, skill sets, and the financial, technological, engineering, scientific, social and cultural limitations among others.

Business Object Editor (BOE) is highlighted to prompt for the necessary details.

The preconditions, deliverables and acceptance criteria emphasize the importance of the 'what' rather than the 'how' to remind project managers that the general best practices for creating a WBS is to treat each work package as an end product which represents a project component. This end

Manual Work Packages

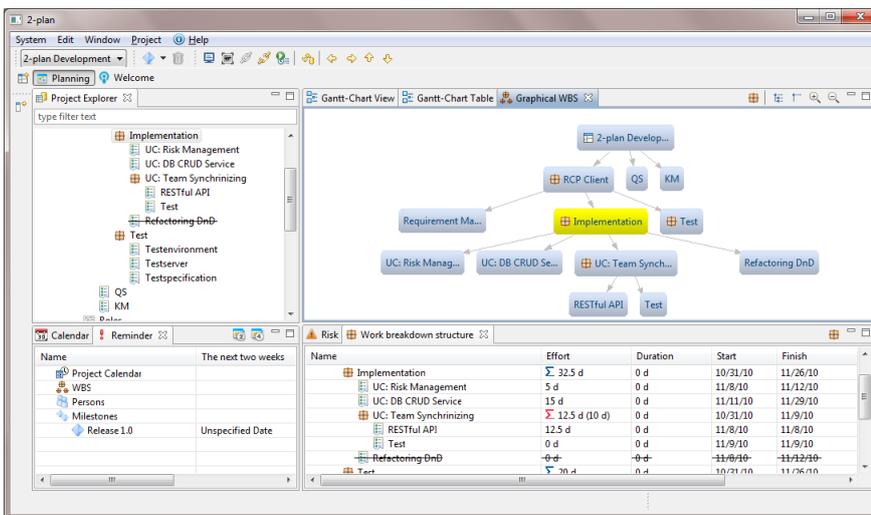
2-plan Desktop also offers an iterative planning feature for Agile PMs. To enable iterative planning, PMs should define manual-type work packages with child's in the WBS. The iterative planning feature only applies to manual-type work packages with child's. Iterative planning is particularly useful in ensuring quality, learning project environments, participatory or collaborative planning in institutional development projects, and in research, development and engineering (RDE) projects.

Since 2-plan combines the best features of agile and traditional project management, traditional project managers can still set work packages under the manual type among several choices. This is one of the benefits that project managers can derive from a balanced PM tool set.

Using Other Work Package Types

In addition to the manual work package type, 2-plan Desktop also has several work package types to accommodate the different configurations of subprojects that are represented as work packages. PMs can define effort-driven and fixed-duration work packages in their WBS. After all, a smaller project that supports the completion of the bigger project can either have a fixed deadline or a planned amount of effort with fixed cost.

Aside from the work packages mentioned above, 2-plan Desktop also allows PMs and team leaders to define a disabled work package type. This is particularly useful when setting up a project buffer for contingencies. The project buffer work package can have cost, time, resource and quality attributes to cover for uncertainties in a work package. PMs can likewise find other creative and practical uses for disabled work packages.



To fully maximize the potential of the 2-plan Desktop and the 2-plan Team, micro-management is strongly discouraged. 2-plan Desktop's graphical WBS differentiates the work breakdown structure from the Gantt chart to encourage proper scope management and the strategic delegation of work packages to knowledge professionals. In essence, the graphical WBS serves as a template team planning tool or as a strategic program management road map that is based on teams.

Generally, 2-plan Desktop's template approach to proper scope management begins with a simplified, graphical representation of the WBS. Next, when planners double click on a work package in the Graphical WBS or Gantt chart, the Busi-

ness Object Editor (BOE) is highlighted to prompt for the necessary details. The preconditions, deliverables and acceptance criteria emphasize the importance of the 'what' rather than the 'how' to remind project managers that the general best practices for creating a WBS is to treat each work package as an end product which represents a project component. This end

product will have a definite scope as addressed through the preconditions field, a clear set of deliverables through the deliverables field, and a specific quality standard through the acceptance criteria field. Most significantly, the tie-in of the BOE with the Graphical WBS ensures that process, product and people components are sufficiently addressed in each work package. The BOE captures basic process attributes like plan type, start or finish date, and predecessors. As mentioned earlier, it also accommodates product attributes including milestones and the budgeted cost per work package. Finally, the BOE also captures data for people attributes like teams and team members. This is 2-plan's main foundation as a team planning software.

Working with Incomplete WBS

The notion that a project plan should have a detailed WBS prior to project execution is counter-intuitive and counter-productive

projects. Even a simple wedding from a wedding planner's point of view will have an incomplete WBS. Deliverables such as the menu, flowers, venue, wedding dresses and give-aways can and

from the details that the newly hired experts or newly contracted outsourcing service providers detailed via the 2-plan Team.

PMs can and should consider the real-world applications and benefits of an Incomplete WBS whether it requires vertical granularity or even horizontal granularity! Project managers do not only manage projects that work on solutions but also manage projects that maximize opportunities. For instance, project firms in the construction business can easily increase their profits from an additional deliverable that the project owner requires while the project is ongoing.



from an executive or program manager's viewpoint. Many real-world projects have incomplete WBS.

For instance, institutional development projects will often require project bidders to define the methodology or approach to complete a project with general deliverables. Deliverables are seldom defined without undertaking a feasibility study on the project concept first. Note that the feasibility study is a project by itself-- and so thus project financing which can affect the scope, quantity, or quality of the deliverables.

Furthermore, the incomplete WBS concept is not limited to big, multi-disciplinary

do change. An ice sculpture might be required during the last minute as a project deliverable. The same holds true in traditional projects with last minute additions or change requests.

To exploit the full potential of 2-plan Desktop's Graphical WBS and Business Object Editor through a team planning template approach, PMs can define a work package in the WBS and find the details for this work package in the future when it is finally implemented. Yes. This is possible in 2-plan even when the other work packages are already being implemented while the incompletely defined work package has not yet started.

PMs can realistically set an initial or ballpark figure on the effort for this work package. Later on as this work package is finally detailed and implemented, PMs can compare the accumulated plan effort

Working with Roles and Teams

Roles as a resource type is highly recommended in planning for a project that requires skill sets not yet found in-house or those skill sets that are not available in the organization's regular outsourced service providers. Meanwhile, Teams as a resource type is designed for organizations, project firms, or business owners that have projects requiring inter-departmental teams, known subcontractors handling specialized services, or regular consultants with technical expertise.

The Roles resource type empowers PMs to define the necessary skill sets for a first-time undertaking without having a specific person or team in mind. This initiates a future Request for Proposals or job bid to find the right fit or further improve the Roles definition for a work package requirement that PMs broadly understand but still lack the minimum knowledge to make better or informed decisions.

The Teams resource type allows PMs to delegate

the management of an entire work package to a project manager or team leader. PMs can simply assign a work package to a team, check the workload, and then calculate the team size (for those forming teams from scratch) to complete the work package. PMs will still have the option though to manage a team of their own by simply assigning several individual project staff to a work package.

Working with Two Monitors

Working with two monitors is also possible in 2-plan Desktop. Using the Detached view feature, PMs can open a Gantt chart in one monitor and open table views in another. PMs will find this feature useful in face-to-face team meetings and brainstorming.

Using the Perspective

PMs can custom-fit the 2-plan Desktop in many ways that gels with their planning work habits. They can disable or enable a selected feature set for viewing. The Perspective feature allows PMs to work on one or more feature set views at the same time.

For instance, for graphical analysis, PMs can open the Gantt chart, Graphical WBS and the Extended Project Explorer and then make a layout of all three views in one convenient display. PMs can save this layout via the Perspective feature for reuse in other project plans.



CLOSING NOTES.

Team planning isn't something new. Executives, program managers, project managers and team leaders have worked on team planning before whether on traditional or agile projects. The only difference perhaps is that a PM tool with the above-described tool set was not yet available before as a software. If you want a balanced PM tool for your teams, consider using 2-plan Project Management Software in your organization. Its team planning template approach could give you that competitive edge for your team based strategic plan.



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