Collaborative planning

In The Power of Project Leadership I outline a seven-step approach that will help you create a collaborative plan with your team. The purpose isn't to create a detailed map that can't be changed but to think through all the project's critical elements and to build the team in the process.

The seven-step approach involves the use of old-fashioned post-it notes and whiteboards and is based on all team members being physically present. If the team is remote the same process can be applied by using an online tool. Nothing beats face-to-face interaction however. If your team is virtual perhaps you can arrange a get-together during the early stages of the project.

Step 0 – Review project scope
We are assuming that the project has already been defined by the time our planning exercise starts. A well-defined project is one where the team has a common understanding of what it is meant to deliver and by when. The first step of the collaborative planning process is therefore to remind the team of what the project's scope and end deliverables are.

Step 1 – Silently brainstorm tasks
The collaborative planning process starts in earnest at the first step. This is where the team brainstorms everything that needs to get done within the boundaries of the project. To do the brainstorming well, make use of post-it-notes and ask people to write down all the tasks and activities that are in scope of the project. They should capture one item per post-it note. It is important not to criticize or restrict people at this stage. Just let them write down whatever comes to mind, as this is the best way to create engagement.

Step 2 – Consolidate and remove duplicates

After the team members have brainstormed on their own they may have accumulated up to 25 post-it notes that overlap with those captured by other team members. The second step is therefore to remove duplicates. As the facilitator reads out the brainstormed tasks the team can remove duplicates and come to an agreement about which tasks and activities they believe the project consists of.

Step 3 – Categorize tasks into logical groups

The team now has a manageable number of post-its that can be grouped into categories or work-streams of the project. One work stream may be related to communication, another to finance, a third to technology etc. At the end of this step, the team will have identified between five and ten categories and will have a number of tasks allocated to each category. It is best to use a whiteboard, flipchart or a wall for this activity where everyone can see which post-its belong to which category. The categories can be identified and captured on different-color post-its so that they are easily distinguished from the tasks.

Step 4 – Create the timeline

The fourth step is to prepare the schedule for the high level plan. Start by putting a timeline across the top of your whiteboard or flipchart paper, flowing from left to right. Use post-it notes to illustrate the different months of the plan. Then place the categories, or work stream headers, down the left hand side of your chart. You can now create a grid consisting of horizontal and vertical "swim lanes". The grid will make it easier to place tasks onto the schedule within the correct month and work stream.

Step 5 – Place tasks onto the schedule

The next step is to transfer the individual tasks onto the schedule based on dependencies. Start by placing the post-it note containing the end deliverable onto the right hand side of the chart. Then transfer all the tasks, one by one. Tasks that can be completed relatively early are placed towards the left and items that can be completed later are on the right. This is a dynamic process where team members discuss where, ideally, this task needs to happen on the timeline. As they place the post-its they should take into account dependencies, as some tasks naturally need to happen before others. Dependencies can be indicated with a marker pen between post-its.

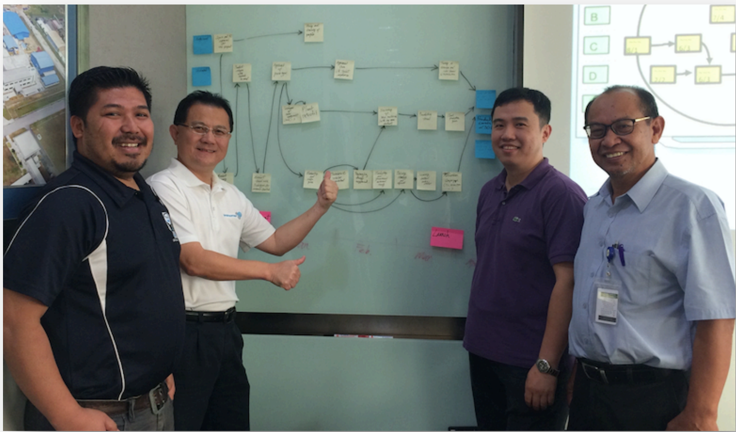
Step 6 – Identify milestones

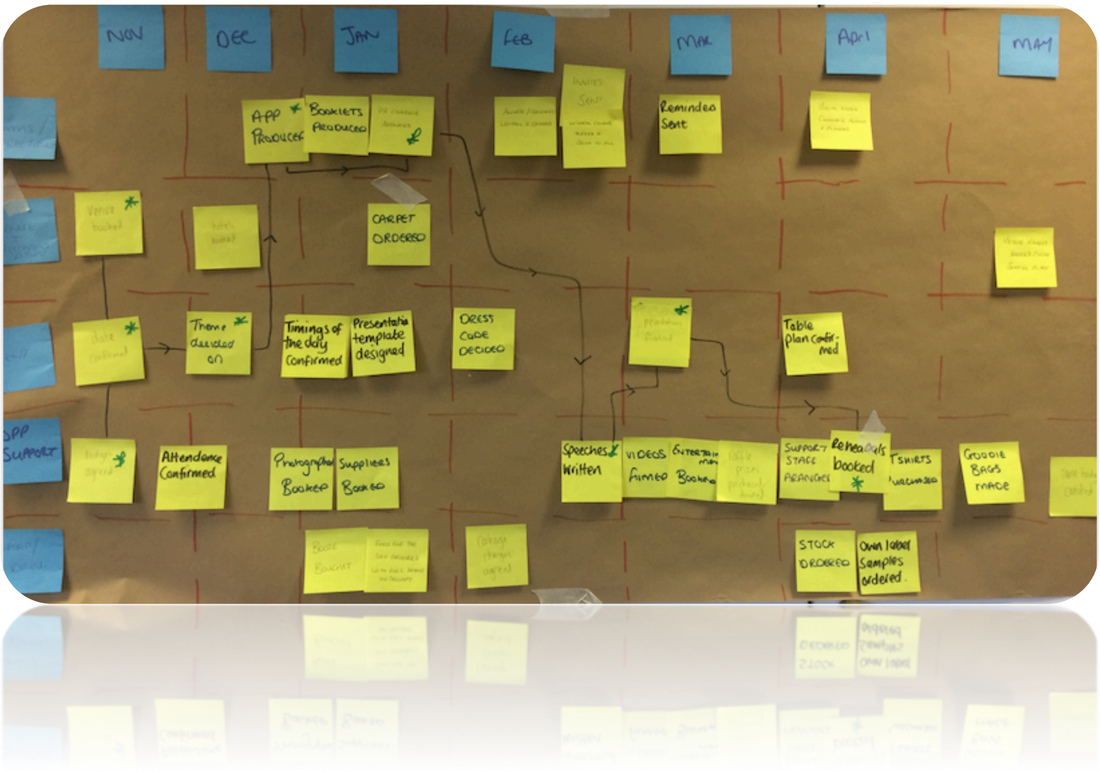
Now that the high-level plan is in place it is time to identify the milestones. Choose a new colour post-its and identify six to twelve milestones. Milestones are tasks with zero duration that indicate an important achievement in the project. They are used to indicate movement and progress and are useful for stakeholder communication and for reporting upwards.

Step 7 - Assign owners

The last step of the collaborative planning process is to assign ownership to each task and milestone on the chart. Each post-it should have one owner who is accountable for moving the task forward. The owner may or may not be the person actually doing the work. Irrespective, it is the person who is accountable for it.

The end result of the collaborative planning process is a high-level plan, with dependencies, milestones and owners built by the team. Each person now needs go to away and validate that the tasks they are accountable for can actually happen at the indicated dates. The beauty of this approach is that because the plan has been built collaboratively, team members are much more likely to commit to it. The plan will also help you to communicate clearly with stakeholders, as a one-page milestone plan may be all that they need.

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Presentation template designed
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Table plan confirmed
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Attendance Confirmed
Photographer Booked
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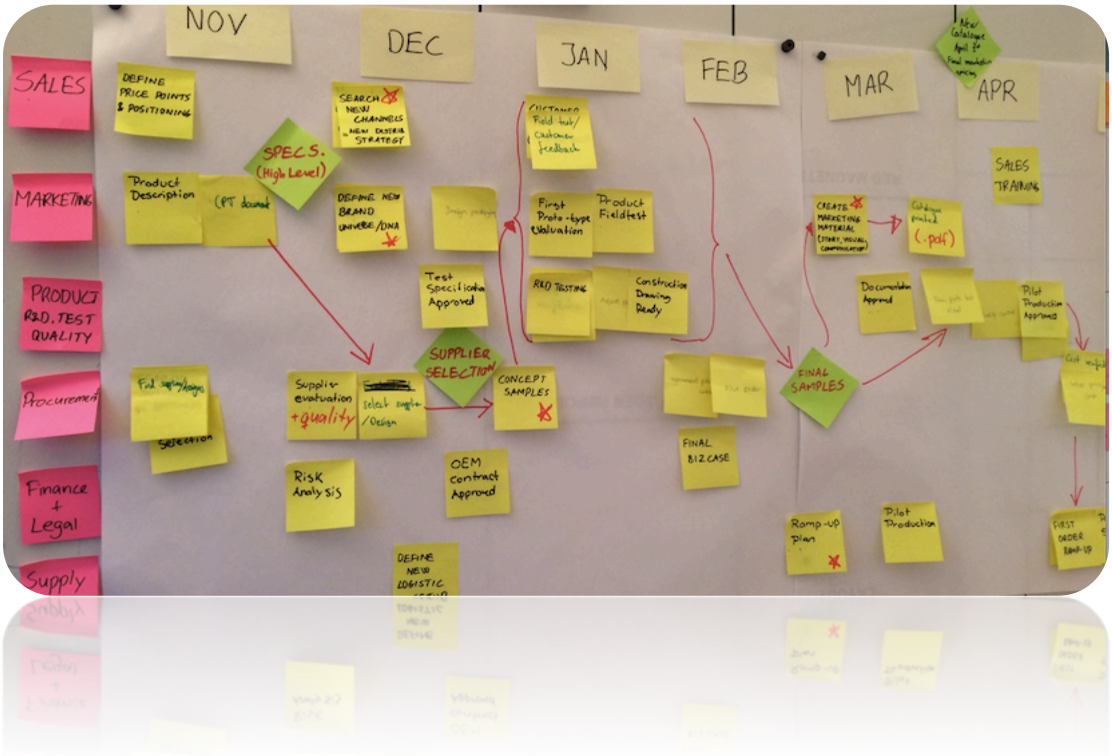
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Procurement
Finance + Legal
Supply
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Product Description
SPECS. (High Level)
DEFINE NEW BRAND UNIVERSE/DNA
First Proto-type Evaluation
Product Fieldtest
Test Specification Approved
R&D TESTING
Construction Drawing Ready
SUPPLIER SELECTION
Supplier evaluation + quality
CONCEPT SAMPLES
FINAL SAMPLES
FINAL BIZ CASE
OEM contract Approved
Risk Analysis
Selection
SALES TRAINING
CREATE MARKETING MATERIAL
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Documentation Approved
Ramp-up Plan
Pilot Production
FIRST ORDER RAMP-UP