



Setting up a Basic Microsoft Project Plan

Neville Turbit

Overview

I have been asked on a number of occasions to review the Microsoft Project plans in an organisation. I am constantly surprised at the number of people who do not understand the basics. Most white papers jump in with moderately complex descriptions of how to set up a plan. The purpose of this white paper is to go the other way. It is to describe the basics of setting up a Gantt chart.

Advanced use of Gantt Charts

Many people will argue that this is not the most correct way to produce a project plan. I agree. Producing a complex project plan is a complex process. This is a simple process and as such, makes simplifications. Once people know the basic rules, they can understand when to break them. The intention is to teach people to drive before you put them on a race track.

Tasks and Milestones

This is fundamental to understanding how to set up a project plan.

- A “Task” is something you plan to do to contribute towards a deliverable. It must start with a *verb*.
- A “Milestone” is the completion of a deliverable, or a defined part of a deliverable. It starts with a *noun*.

In Microsoft Project a milestone is a task with zero duration.

Example Tasks

The following are examples of tasks:

- *Arrange* workshops
- *Produce* draft feasibility report
- *Produce* final feasibility report
- *Gather* requirements
- *Write* test plan
- *Test* software

Example Milestones

- *Workshops* complete
- *Draft report* produced
- *Final report* produced
- *Requirements* complete

- *Test Plan* complete
- *Software* tested

Work Breakdown Structure (WBS)

The WBS is produced by breaking down the work into logical chunks. Typically this means major chunks of work. Ask yourself if you can put a one or two word label on a piece of work? Is it fairly self contained? Building on the example above, it may be:

- Feasibility
- Requirements
- Testing

One of the main reasons for producing a WBS is to focus your thinking. Take a top down view and document the major work areas. You can then subdivide even further if the major work areas are too big.

Another way to approach the WBS is to break it down into phases. For example, Phase 1 may be both feasibility and requirements. Whilst it is a valid approach, I would make Phase 1 a top level, and Feasibility and Requirements second levels.

Phase 1

Feasibility

Requirements

Define Deliverables

The next step is for the project team to define all the deliverables. This includes internal and external deliverables.

- External deliverables are the things the project produces for the organisation
- Internal deliverables are the things the project produces to enable the project to continue towards completion

External deliverables include amongst other things, implemented software, products for sale and project reviews. Internal deliverables include things like weekly reports, specifications, presentations and test plans. You can develop a checklist over time to use with teams.

Define Quality Processes

Now you have the list of deliverables, how are you going to guarantee quality? For each deliverable determine what quality process will apply. It can be testing, peer review, senior management approval or whatever.

Start the Project Plan

All the deliverables go into a project plan as milestones. A second set of milestones are the deliverables ready for QA. For example “Report ready for peer review”. These occur close to the final deliverable but allow time for rework.

Add all the tasks or actions required to produce the deliverables. Estimate the time for each task. Don’t fall into the trap of thinking “if all goes well it will take ...” When did every task in a project “go well”? Be realistic. Some tasks will go to plan and some will take longer. Some may even take less time but these rarely cancel out the overruns.

The other timing aspect is to understand you can almost never predict all the work required. There will be tasks that become evident only after the project is well underway. If the future is misty, make allowance in the plan for unspecified tasks.

Also look for any milestones along the way. For example if a requirements document is to be produced by holding workshops, a milestone may be “Workshops complete”. Add these to the plan.

Dependencies

Now you can start to add dependencies. Look for what needs to be done before each step can be undertaken. Create your dependencies. This may lead to changing the order in your Gantt chart to make it more logical. You might even want to create another level in your WBS to clearly identify a group of activities.

For example, you may have a WBS heading called “Feasibility”. When you add your tasks and milestones, you realize that there are two major chunks of work.

- Plan and carry out workshops
- Write a report

It may be worth creating two levels called “Workshops” and “Report”

Resourcing

You can now work out who is going to do all this work. Add resources to the tasks. When it gets to milestones, only put one name, and make sure it is the person responsible for delivery. Resource leveling and allocation is another topic and will not be covered in this basic white paper.

Review the Plan

When you have reached this point, you can check the plan to make sure it is well structured. Here ten checks to carry out:

1. Are all the deliverables included as milestones?
2. Do they all have a quality check scheduled?
3. Is there time for rework after the quality check?
4. Are the chunks of work too big? Can you go down another level with the WBS?
5. Do all the tasks start with a verb?
6. Do all the milestones start with a noun?
7. Milestones should occur every 1 to 2 weeks to both keep focus, and provide feedback if you are on track or not. Do you have milestones at least once every 2 weeks?
8. Are all dependencies in place?
9. How reliant is the timing on everything going exactly as planned? Is there a buffer when something doesn't go to plan?
10. Are resources assigned to all tasks and milestones

Conclusion

If you can get a plan in place that follows the steps above, you are well on the way to having a solid plan to work to. Many organisations struggle to get this far. Once you have completed one or two plans you can start to get more sophisticated in your planning. There are books and information available that will take you to the next level but first you have to get the basics right.

Neville Turbit has had over 15 years experience as an IT consultant and almost an equal time working in Business. He is the principal of Project Perfect. Project Perfect is a project management software consulting and training organisation based in Sydney Australia. Their focus is to provide creative yet pragmatic solutions to Project Management issues.

Project Perfect sell “Project Administrator” software, which is a tool to assist organisations better manage project risks, issues, budgets, scope, documentation planning and scheduling. They also created a technique for gathering requirements called “Method H”™, and sell software to support the technique. For more information on Project tools or Project Management visit www.projectperfect.com.au