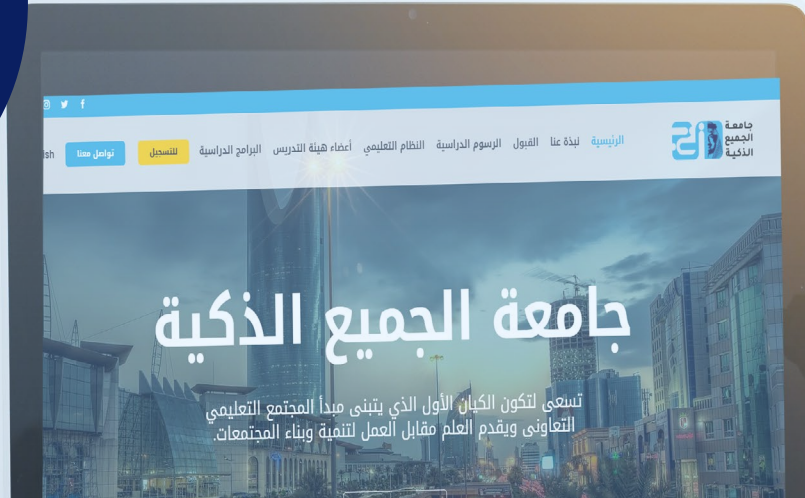




Project Planning Process



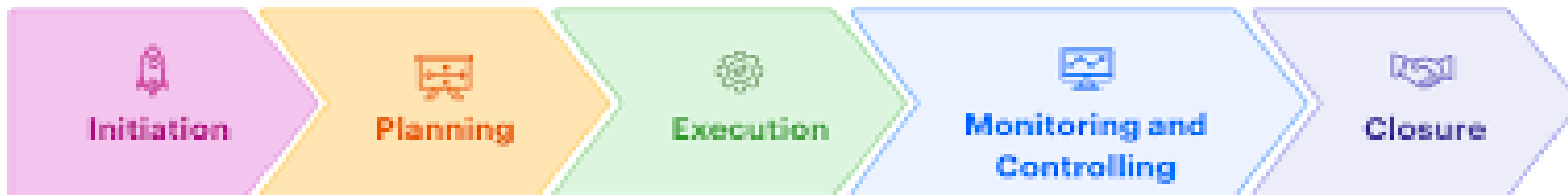
In the last lessons...

- Planning provides a nexus between the managerial functions required to activate a project and the elements needed for successful project completion.
- It is concerned with deciding in advance **what**, **when**, **how** and **who** will take the necessary actions to accomplish established objectives.
- This lesson has examined the project environment for planning, considered the purposes of planning, focused on the stages of project planning, evaluated the elements and stages of planning and discussed the role of decision making in project planning.
- Project managers seeking success should master these concepts.



In the last lessons...

- According to the PMBOK Guide (Project Management Body of Knowledge) by the Project Management Institute (**PMI**), a **Project Life Cycle** consists of 5 distinct phases that combine to turn a project idea into a working product:



In the last lessons...

- We also saw the importance of the roles that the Vision and the **Mission** play in any Organization:
- Communicate the purpose of the organization to stakeholders,
- Inform strategy development
- Develop the measurable Goals and Objectives by which to gauge the success of the **Organization's Strategy**.



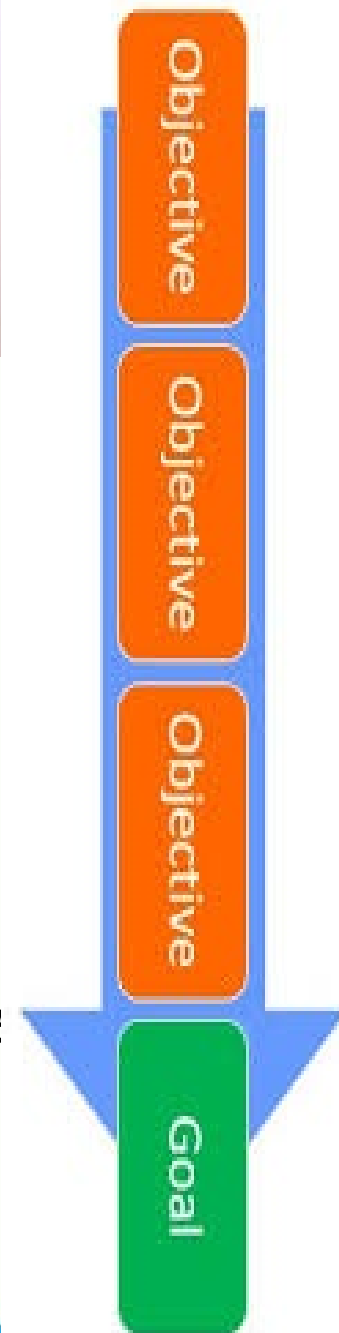
In the last lessons...

- Values are also very important in every organization.
- They can help define an organization's personality and help it stand out from the crowd.





- **Goals** and **Objectives** are statements that describe what the project will accomplish, or the business value the project will achieve.
- **Goals** are high level statements that provide overall context for what the project is trying to achieve, and should align to business goals.
- **Objectives** are lower level statements that describe the specific, tangible products and deliverables that the project will deliver.
- The definition of **Goals** and **Objectives** is more of an art than a science and it can be difficult to define them and align them correctly.



Chapter Objectives

- Identify the key components of the Project Management Institute (PMI) ®
The **Project Planning Process**.
- Recognize the main steps **of Planning Process**.
- Determine the **types of Planning**
- Discover the importance of **Planning Documentation** needed to plan and implement a successful Project.

Syllabus

**I- The importance
of the Planning
Process**

**II- The main
Steps of Planning
Process**

**III- Types of
Planning**

**VI- The Project
Documentation**

I- The importance of Planning Process

I-1- What is a Planning Process

- A Process is **series of actions** which are carried out in order **to achieve a particular result**.
- “The Planning Process Group consists of those processes that establish the total scope of the effort, define and refine the objectives, and develop the course of action required to attain those objectives”.

*A Guide to the Project Management Body of Knowledge
(PMBOK Guide) Sixth Edition*

I- The importance of Planning

- **The Planning Process** is complex.
- Therefore, it embraces a number of **steps in the Planning Process** to be taken.
- In Planning, various facts are collected and analyzed and best out of all is chosen and adopted.
- It is not necessary that the **Main Procedures or Steps of Planning Process** which is valid for one organization may be valid for other organizations.

I- The importance of Planning

- **The Planning Processes** begin early in the Project, and the product of the processes is the Project Management Plan.
- The Project Management Plan should include a Project Schedule as well as the various plans addressing each of the relevant **Project Management Areas**: Integration, Scope, Time, Costs, Quality, Human Resources, Communication, Risks, and Procurement.
- The Project Team performs **the Planning Processes** throughout the project to evaluate the need to adjust the plan in response to project realities.

I- The importance of Planning

- **The Organizational Planning Process** is not something that magically occurs, nor is it the domain of only the highest levels of institutional authority.
- On the contrary, **the Planning Process** should include the involvement of all leaders.
- Effective Planning requires possessing an understanding of the basic blocks involved in the process and engaging in some simple behaviors.

I- The importance of Planning

In **the Planning Process** , it is important to:

- Identify the **Vision, Goals** or **Objectives** to be achieved.
- Formulate the **Strategies** needed to achieve the Vision and Objectives
- Determine and **allocate Resources** necessary to achieve the Vision and Objectives
- Set **Implementation Plans** to monitor and evaluate progress towards the Vision and Goals

I- The importance of Planning

I-2- Why is Project Planning important?

- **Project Planning** is a crucial stage that comes right after initiation in **Project Management Phases**.
- Through proper Planning, you streamline the entire Project into a series of steps and ensure the availability of all the resources on time.
- **Project Constraints** such as time, scope, and costs are discussed in the project planning process, and mitigation plans are developed after the identification of potential risks.
- By comparing the actual progress with the Project Plan, you can also monitor the performance of your team and take the necessary steps to improve it.

II- The main Steps of Planning Process

I-3- The 7 main areas where Project Planning is important

According to the PMBOK, there are 7 main areas where Project Planning is important for successful projects.

GANTTPRO



II- The main Steps of Planning Process

I-3- Advantages and Disadvantages of Planning

I-3-1- Advantages / Benefits of Planning

Reduces Uncertainty	Encourages Innovation and Creativity	Focuses attention on objectives and results
Focus on Objectives/Goals	Improves Motivation	Establishes a basis for teamwork
Economical Operation	Avoids Random Activity	Helps anticipate problems and cope with change
Facilitates Control	Improves Competitive Strength	Better coordination

II- The main Steps of Planning Process

- Among the most important advantages of planning, it helps to improve coordination among the different members of the team.
- It can also improve the internal vision of the business environment, and help a Project Team to adapt quickly to the changing environment.
- To summarize, we can say that planning is a necessary exercise in order to reduce the risk and organize production in line with the Objectives.

II- The main Steps of Planning Process

I-3-2- Constraints / Disadvantages or Limitations of Planning

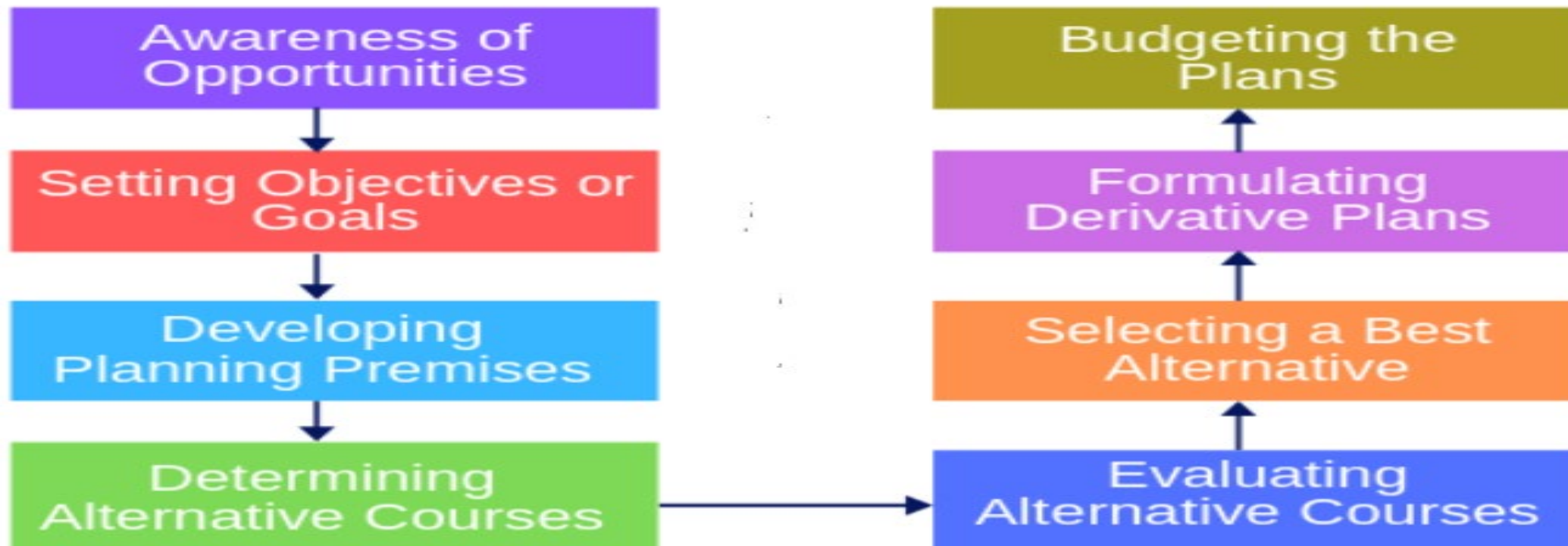
Lack of Reliable Data	Costly Process	External Inflexibility
Rigidity Time	Rapid Change	Expensive
Consuming Process	Internal Inflexibility	Resistance to Change

II- The main Steps of Planning Process

- Because various factors that go into planning may differ from organization to organization.
- However, general procedures of **Planning involve the following steps** as shown in the figure below, which can be made applicable to any Organization with minor modifications.

II- The main Steps of Planning Process

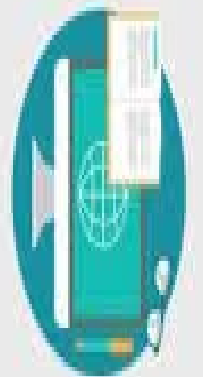
There are the 8 Main Procedures or Steps of Planning Process as follow:



Main Procedures or Steps of Planning Process

III- Types of Planning

- Organizations use different types of planning according to their different purposes.
- The layout can be classified according to In light of several criteria, the most important of which are:
 - 1- On the basis of impact
 - 2- On the basis of time period
 - 3- On the basis of the field of use
 - 4- On the basis of Functions
 - 5- On the basis of activity



III- Types of Planning

III-1- on the basis of impact

1-Strategic Planning

- defines the **Company's Goals** for a set period of time and ensures that those Goals align with the **Company's Mission, Vision, and Values**.
- Strategic Planning usually involves **Top Managers**.

2-Tactical Planning

- The **Tactical Strategy** describes how a Company will implement its **Strategic Plan**.
- A **Tactical Plan** is composed of several **short-term Goals**, typically carried out within one year, that support the **Strategic Plan**.
- Generally, it's the responsibility of **Middle Managers** to set and oversee Tactical Strategies, like **planning and executing a marketing campaign**.

3- Operational planning (OP)

- It is the process of planning Strategic Goals and objectives to Technical Goals and objectives.
 - It describes **Milestones**, conditions for success and explains how, or what portion of a **Strategic Plan** will be put into operation during a given operational period, in the case of commercial application, a fiscal year or another given budgetary term.
 - An operational plan is the basis for and justification of an annual operating budget request
- a **five-year Strategic Plan** would typically require **5 Operational Plans** funded by **5 Operating Budgets**.

4- Contingency Planning

- It waits in the wings in case of a **crisis** or **unforeseen event**.
- It cover a range of **possible scenarios** and appropriate responses **for issues** varying from personnel planning to advanced preparation for outside occurrences that could negatively impact the Business.
- Companies may have Contingency Plans for things like how to respond to a natural disaster, malfunctioning software.

III- Types of Planning

Strategic Planning:

The setting of broad, long-range goals by top managers.

Tactical Planning:

The identification of specific, short-range objectives by lower-level managers

Contingency Planning:

Backup plans in case primary plans fail

Operational Planning:

The setting of work standards and schedules

III- Types of Planning

III-2- On the basis of time period

Long Term Planning

- Long term Plans: **>5yrs**
- It specifies what the organization wants to become in long run.
- It involves great deal of uncertainty.
- Higher management levels focus on longer time horizons.
- Cover a longer time

Intermediate Term/ Midterm Planning

- **1 year < Medium Term Plans <5years**
- It is designed to execute Long Tterm Plans.

Short term planning

- Short term Plans **< 1year**
- It provide basis for **day to day operations**.
- Meet a particular objective in the near future
- Answer the question: **Are we doing things right?**
- Should fit well within and contribute to long-range plans.

III- Types of Planning

III-3- On the basis of the Field of use: It is divided into two parts

A. Many use plans, including several types:

Strategies

high level plans to achieve one or more goals under conditions of uncertainty



Policies

deliberate systems of guidelines to guide decisions and achieve rational outcomes



Laws

rules of conduct or action that a nation or a group of people agrees to



Procedures

particular ways of accomplishing something or of acting



Rules

a regulation or direction for doing some particular activity



B. Unique to use plans and contain

Programs

group of activities or things to be achieved



programs

Projects

sets of tasks that must be completed in order to arrive at a particular goal or outcome.



III- Types of Planning

III-4- On the basis of Functions

Marketing Planning

Production Planning

Purchasing & Storage Planning

Financial Planning

Human - Resources Planning

III-5- On the basis of Activity

Economic/Financial Activity

Industrial Activity

Structural Activity

VI- The Project Documentation

VI-1- Definition

- **Project Documentation** is the process of creating, organizing, and managing a collection of key documents you need to successfully execute a project and report progress to clients and executives.
- **Project documentation** is the process of recording the key project details and producing the documents that are required to implement it successfully. Simply put, it's an umbrella term which includes all the documents created over the course of the project.
- **Project documentation** must lay the foundation for quality, traceability, and history for both the individual document and for the complete project documentation. It is also essential that the documentation is well arranged, easy to read, and adequate.



VI- The Project Documentation

- Since the **Project Documentation** includes maintained or recorded material, Project Teams need Project Documentation in order to provide proof of traceability.
- **Project Documentation** also helps to track the **Project Performance** which is important for decision making.
- Experienced project managers always understand the importance of project documentation because it plays a key role in dispute resolution.



VI- The Project Documentation

VI-2- Importance of Project Documentation

- **Project Documentation** is vital for any Project's success.
- Typically, **Project Teams** use hundreds of **Project Documents** while they are managing their Projects.
- All the Documents are essential and they serve different purposes.
- Even though Project Managers are responsible for managing this process, the Project Documents are created in collaboration with the Project Team and other important Stakeholders.



VI- The Project Documentation

- **The Project Documentation Process** should start at the beginning of the Project and be continued all throughout its Lifecycle, recording not only vital information but also any changes that might occur.
- Once archived, the Documents from a recently finished Project can be used to streamline the Planning and Implementation Processes for future Projects.



VI- The Project Documentation

There are numerous advantages behind having a rigorous project

- **Clearly define and set goals, requirements, and baseline** so that stakeholders have the same expectations of a project
- **Turn key project documents into a detailed Work Breakdown Structure** you can use to create realistic project schedules
- **Get a comprehensive overview of how your project progresses** and keep everyone involved up to date on the project's current status
- **Enhance the traceability of your project's workflow** and easily see which tasks need to be completed, when is their deadline and who is responsible
- **Improve team communication and collaboration** and minimize misunderstandings
- **Speed up employee onboarding** by providing new team members with access to all the knowledge recorded during previous and ongoing projects
- **Be well-prepared when it comes to mitigating potential risk or solving issues** that might occur during the implementation of your project
- **Evaluate the team's performance** once a project has finished and determine the lessons learned and possible improvements



I- The Project Documentation



VI-3 - A Documentation for each Project Life Phase :Examples of Project Documents

- **Project Documentation** must lay the foundation for quality, traceability, and history for both the individual document and for the complete project documentation. It is also essential that the documentation is well arranged, easy to read, and adequate.
- It's difficult to strictly define what should be documented over the course of a project, as it's strongly dependent on the kind of project you are managing.
- A major Project at a big Enterprise usually requires a lot more paperwork than a small-scale initiative at an early-stage startup.

VI- The Project Documentation

1. Initiation Project Documents

- Project Proposal
- Project Business Case
- Project Feasibility Study
- Project Charter

2. Planning Project Documents

- Project Plan
- Work Breakdown Structure
- Scope Statement
- Communication Plan
- Project Schedules
- Project Budget

3. Execution Project Documents

- Project Status Report
- Project Communication Plan
- Risks & Issues Log
- RAID log

4. Controlling Project Documents

- Change Request Management

5. Closing project documents

- Project Closure Document
- Lessons learned



CONCEPT

1. BUSINESS CASE

An idea for a project starts life as a business case. Once approved, the idea becomes a project.



INITIATION

2. CHARTER

The project charter is used in the Initiation phase to set out exactly what the project is going to deliver.



PLANNING

3. PLAN & SCHEDULE

The project plan explains how you are going to manage, monitor and control the project. The schedule sets out when tasks will happen.



4. RAID, REPORTS & BUDGET

The project RAID tracker, status reports and budget tracker are used to track and manage progress throughout the Execution phase.



EXECUTION

CLOSURE

During the Closure phase, the lessons learned document and the project closure document are critical. They help ensure a smooth handover.



5. LESSONS LEARNED & CLOSURE DOC

VI- The Project Documentation



Proper **Project Documentation** is undoubtedly a mandatory element in managing projects, but it is also extremely useful in keeping Projects moving at a speedy pace, ensuring all stakeholders are as informed as possible, and helping the organization make better improvements in future Projects.



VI- The Project Documentation

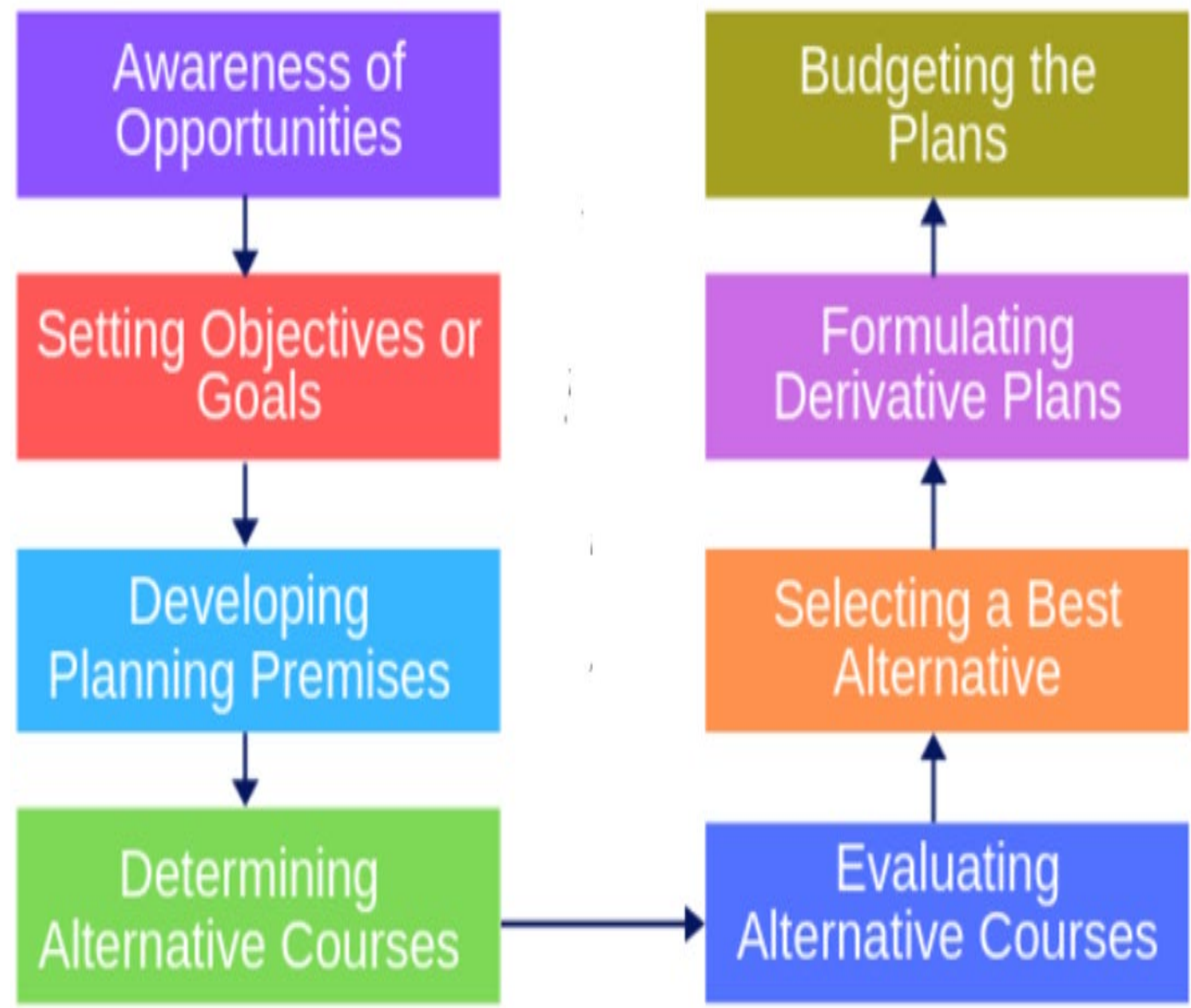
document	purpose
action and issue tracker	track pending actions and open issues
project charter	a sort of contract between the customer and contractor
project organization	overview of people and roles in the project
project roles and responsibilities	description of roles and responsibilities
project plan	activities and timeline
project budget	project cost (plan and actual)
stakeholder matrix	list of stakeholders involved in the project
risks log	critical risks
project communication plan	structures communication and meetings in a project
scope statement/requirement specification	description of customer requirements
change request tracker	track changes to the project scope



Summary



The main areas where PP is important



Main Procedures or Steps of Planning Process

Advantage and Disadvantage of Planning

Advantage

- 1.Reduces Uncertainty
- 2.Focus on Objectives/Goals
- 3.Economical Operation
- 4.Facilitates Control
- 5.Encourages Innovation and Creativity
- 6.Improves Motivation
- 7.Avoids Random Activity
- 8.Improves Competitive Strength

Disadvantage

- 1.Lack of Reliable Data
- 2.Rigidity
- 3.Time Consuming Process
- 4.Costly Process
- 5.Rapid Change
- 6.Internal Inflexibility
- 7.External Inflexibility



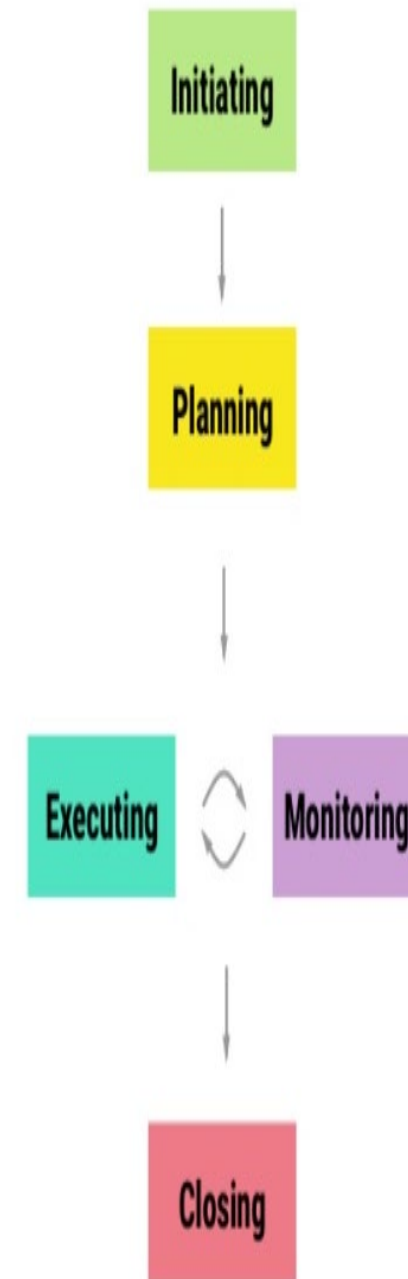


Figure : PMBOK 5 phases of a project (PMI, 2013a)

