



Project Primer

It's a Blast!

Volume 1, Issue 8

www.MFA-A.com

August 2010

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Greetings

We hope that this month's issue of the "Project Primer" offers you valuable insight on the topic of a Project Execution Plan. This is a topic that many of us struggle with, and a process that we naturally tend to make more complicated than it really needs to be. We hope you see the value in some of the tools we have used over the years to help simplify and streamline the process, achieve better project control, and improve overall project performance.

About Us

It's our 10 year anniversary this year!

10 year anniversary tidbits:

Our project execution planning services first began to gain notoriety back in April 2006 when we were engaged to develop a set of Project Management Practices for a large organization that was developing a Project Management Organization (PMO) group. Our guidelines were developed to bring operational practicality, consistency and repeatability to their project

Project Execution Plan

Few Project Management topics can be as confusing and potentially overwhelming as the process of creating a Project Execution Plan. It is a project tool that is used to keep track of and manage the documents, plans and discussions that are created during the planning phase of a project and maintained throughout the project lifecycle. The Project Execution Plan, otherwise known as the PEP, is simply a collection of the various plans and tools needed to manage a project, which sometimes might include processes or procedures that the PM has created specific to their project. The PEP contains not only the documents from the initiating and planning phases (Estimate, Risk Matrix, Contract, Baseline package) of a project but also the execution phase (Schedule, Control tools, Progress Reports) and job closeout (Final report and Lessons Learned). It is a single document repository meant to capture the purpose and essence of a project and to provide a record of the activities associated with the project. Think of it as a daily journal that represents the written record and memory of the project.

Where a PEP can become potentially confusing is in the amount of detail it should contain. PEP's can come in various shapes and sizes and should vary with the risk and complexity of a project. A one-size fits all approach is not recommended. Larger projects generally require more documentation, planning and a greater use of project control tools and company resources. Larger projects also require greater oversight in the form of management control than smaller projects -- which represent less risk and commitment of company resources.

performance. The successful results of this engagement led to several other similar opportunities with both privately-held as well as publicly-traded companies. Some of these engagements were so successful, that they also led to the development of training programs specifically tailored to our customers' business needs.

The repeated success of our Project Management and Construction Management Standards programs eventually led to the development and marketing of our Project Performance Management System. This system is based on a graded-approach to project risk management. This operational approach to "practical project management" has consistently generated an additional 2 to 3 percent on projects across all industries and market sectors where we have been engaged to perform support services.

Additional Planning Resources

Project Planning

[Wikipedia](#)

Execution Plan

[E-articles](#)

Project Execution Plan

[PM Hut](#)

A quick and easy tool for a Project Manager to use in the creation of a PEP is a file template or guide. An effective template should balance the need and purpose of documenting the project with the size and amount of risk in the project. Project Execution Planning should not be done with a shot-gun approach that asks for everything to be detailed in the PEP. The size and complexity of the project should dictate the level of detail used to document and control the project. Excessive amounts of documentation for smaller projects will not only overwhelm the PM with needless amounts of paperwork and bureaucracy but also adds additional cost to the project. Too little documentation on large projects can be an exposure to potential risks that could impact both the project as well as the company's bottom line.

As an advocate for a tiered or graded-approach to Project Controls, we recommend that Project Execution Planning should always use a graded-approach methodology to develop and retain "the right amount" of detail.

Typical topics that should be core to every PEP include:

- Baseline package
 - Original project scope (Contract documents)
 - Original project deliverables (Contract documents)
 - Schedule (detail commensurate with size of project)
 - Potential risks and planned responses (Risk Matrix)
 - Original detailed budget
 - Execution plan (how the job will run)
- Identification of stakeholders, project team and responsibilities
- List of controls and monitoring tools
- Guidelines for addressing changes to scope, schedule, budget

When maintained and tailored to an organization, a PEP can be a valuable asset that will continue to deliver value and benefit to future projects. It will also help guide younger PM's in developing their skills and ability to anticipate, identify, communicate, and document key project variables

John Winchell, PMP
Senior Project & Operations Manager
Allen & Associates

Service Spotlight

We have recently added the "Brown Bag" training seminar series to our list of services. Understanding the operational constraints associated with providing training services to project managers with active projects, we developed a series of 1-2 hour seminars to provide process-specific training on common project management topics such as project execution planning, change order management, forecasting & reporting, etc...Visit our website for more information and a course syllabus. If you have additional questions, give us a call.

We can be reached at (630) 515-0883 or by using our website [Contact Form](#).

Future Topics

If you have a topic of interest you'd like to see please submit your suggestion on our website

[Contact Form](#)

Planning Humor



FORETHOUGHT

There's a reason it's called "Planning".

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