Putting the Cart After the Horse:
Project Planning and Scope Definition

By Chris Wright, MPM, PMP

In today's fast-paced business world, proper project planning can often take a backseat to other objectives. Employees are asked to leap into the project before the scope or Work Breakdown Structure is even defined. Does this scenario sound familiar? Your frazzled boss comes running into the room with a hot new project that needs to be completed a.s.a.p. He tells you that there is no time to waste on discussing the project and wants you to get to work on it pronto. Essentially, he is asking you to skip the most critical phase of the project—planning.

I have worked with many different project teams in many different industries and have discovered that the majority of project teams make the same mistake when developing project plans: they typically begin with determining how the work will proceed prior to defining the project itself or the Work Breakdown Structure (WBS) that will be required. In other words, most project teams "put the cart before the horse."

Steps to a Well-Defined Project Plan

Fortunately, the project management discipline has defined standard project planning processes that are intended to provide project teams with guidelines for developing a well-defined and realistic project plan. Though elementary in nature, the following steps are beneficial in formulating a comprehensive and workable plan.

- Define the scope

- Identify the steps, sequence the work, and determine the timeframe

- Allocate the resources

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Scope Definition

Once the organization's management has formally authorized a project to proceed, it is imperative that the scope is properly defined. The scope definition and decomposition processes are designed to help the project team establish the boundaries of the project. Essentially, this is the phase of project planning where the organization answers the "what" questions associated with the project.

The primary technique for defining and decomposing scope is the Work Breakdown Structure (WBS). The WBS is a deliverable-oriented grouping of the project components that illustrates and depicts the scope of the project. In essence, it serves as the organizational chart for a project by taking deliverables and breaking them down into smaller, more easily managed pieces. A Work Breakdown Structure working session not only allows the team to define the content of the project (general rule: if it is not in the WBS, it is not in scope), but it also encourages early buy-in from key stakeholders as they contribute to the project planning process.

Activity Definition, Activity Sequencing, and Schedule Development

Once we have approved the Work Breakdown Structure, the team can identify how the project deliverables will be produced. With activity identification and definition, the team is determining "how" the project's scope (i.e. Work Breakdown Structure elements) will be delivered. At this point in planning the project, the team should not be concerned with who is responsible or how long specific activities will take to complete. This process is more concerned with the activities and tasks (actions) required to deliver the committed project work. To accomplish this phase of project planning, use techniques such as brainstorming, seeking expert judgment and gathering historical and background information.

Teams can now decide the order of the activities and their associated durations. These steps will help teams determine the overall project schedule (when) and its associated critical path (how long). By definition, the critical path is the longest time path on the project's network diagram, thus representing the minimal amount of time required to complete the project. At the conclusion of these steps, a project team can understand when the project can be optimally completed based on relationship of activities, dependencies, sequence, and duration.

Allocate Resources

It is now time to identify, allocate, and align the team members with the Work Breakdown Structure of the project. During the resource planning processes, the team is answering the "who" questions associated with the project's work. Depending on the skill level and number of the resources that are available, this step could either increase or decrease the amount of time needed to get the project done. At this point, it is necessary to revisit the Critical Path and overall duration of the project, adjusting where necessary.

Conclusion

Most of the hurdles and roadblocks that occur during a project arise due to poor or inadequate project planning. Putting the cart before the horse and jumping head first into a project can be tempting, but that haphazard approach will almost always lead to future headaches. Taking a strategic approach to project planning, from the Work Breakdown Structure to the timeline, will help to ensure that you and your colleagues' hard work aligns with the scope of the project, ultimately ensuring successful completion of the project at hand.

About the Author

Chris Wright is a certified Project Management Professional (PMP) with nearly twenty years of project leadership, mentoring, consulting and education experience. He is also the founder and president of Tanden LLC, a human learning and performance firm that specializes in project management, leadership and training and development offerings.

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