

THE PROJECT LEADER

THE PLANNING SESSION

**YOUR GUIDE TO FACILITATING THE
WORK BREAKDOWN PLANNING SESSION**

Establish a Shared Vision

This section will help your team establish a shared vision by breaking down the project goal into bite-sized deliverables and activities. Help team members see how they fit into the overall project.



Establish a Shared Vision is all about getting your project team on board with supporting and pursuing your project goal. Many project teams do not have a clear sense of how they fit into the project. The project may require very different activities and skills than they are used to doing in their regular day jobs. The project goal may not be clear, so they don't know exactly what is needed. Even if they understand the goal, at least somewhat, the team may not be clear on what activities are needed to get there.

To overcome this common challenge, you will Establish a Shared Vision with your team by learning and applying each of these steps:

- Step 1: Convert charter to a Tier 1 work breakdown
- Step 2: Conduct a work breakdown planning session
- Step 3: Organize and sequence activities
- Step 4: Assign activity owners
- Step 5: Build momentum by initiating next steps on next-up activities

At the end of the section, you will have a breakdown of the project deliverables and activities, with a sort order of priority and timing. This step will empower your team to take action now in pursuit of the project goal.

Apply the Method

Now it's your turn! This section will walk you through, step-by-step, in how to Establish a Shared Vision for your project.



After reading the overview of Establish a Shared Vision and reading through the real-world example, it is now your turn. Read this section for instructions on how to conduct a Work Breakdown Planning Session with your project team.

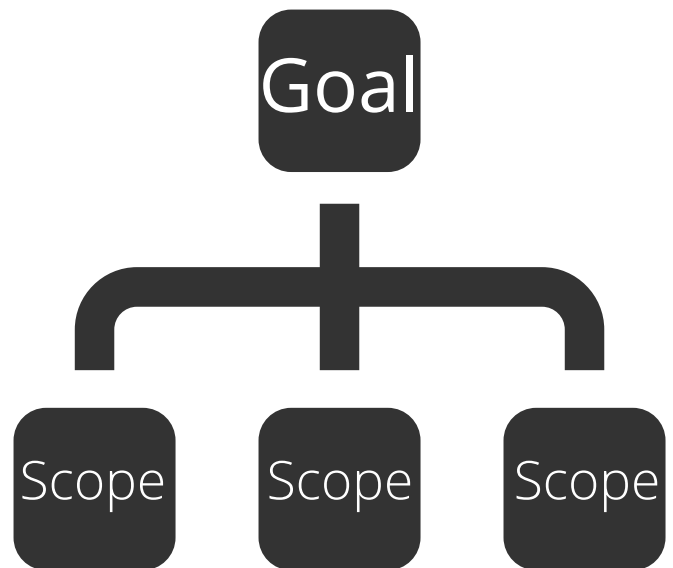
Step 1: Conduct Work Breakdown Planning Session

This exercise is integral to the Establish a Shared Vision phase whereby your team will breakdown the work into bite-sized deliverables and activities. Download the template at the site listed below for a more detailed guide to conducting your team's Planning Session.

For our real-world project example, you will see how the goal statement and In-Scope section of the Simplified Project Charter form the first tier of the project's work breakdown.

From there, the team defined major activities needed to achieve each of the In-Scope deliverables.

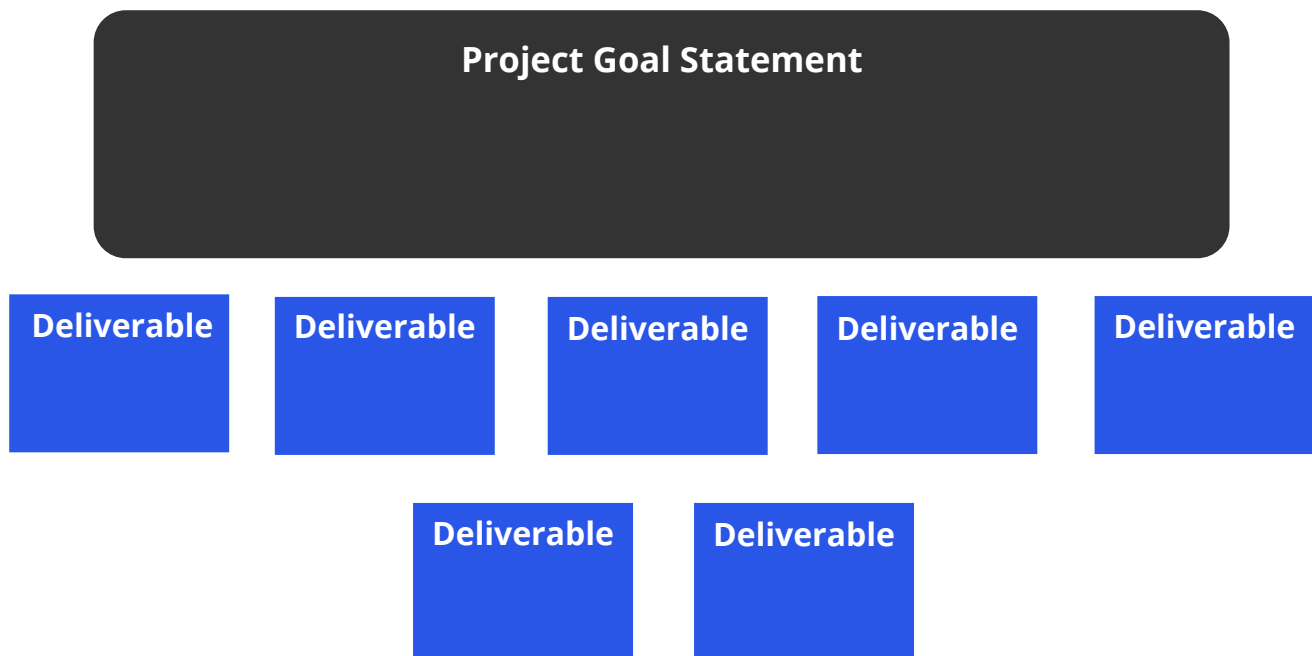
See next pages for more learning.



Download the [Planning Session](http://www.theprojectleaderbook.com) at: www.theprojectleaderbook.com

Tier 1 Work Breakdown

Using the goal statement and In-Scope section of the Simplified Project Charter, represent the Tier 1 breakdown of your project goal and In-Scope deliverables



Conduct the Planning Session

Gather your team together (virtually or in-person) for a planning session. This session usually takes 3-4 hours as you are first learning and applying this method. Over time, you may be able to conduct this in 2-3 hours for smaller, less involved projects. Ultimately, more time spent in this exercise saves you many hours and days of lost time later by removing team confusion, gathering team/expert input now, and establishing a shared understanding across your team.

Gather these materials prior to your planning session.

In-Person Planning Session materials

- Workspace with no outside distractions
- A table for people to write on
- Large-sized 6x9 Post-It notes (for posting Tier 1 items above)
- 3x3 Post-It notes of various colors (usually yellow, blue, orange, and pink)
- Sharpie magic markers (one per person)
- White board or wall with Post-It flip chart paper (for sticking post-its to large wall)

Virtual Planning Session materials

- Zoom, WebEx, Google Meet, or other video conference service
- Virtual white-board app such as: Miro, Mural, Microsoft Visio, Google JamBoard
- Optional - at least 2 monitor setup for you (presenter)

Planning Session - Setting up Project room

For your planning session, set up the project room as follows

- Clear a long section of wall or whiteboard
- Tape up one flip chart page for each major deliverable from the scope section of the Simplified Project Charter.
- Write the Project Goal Statement at the top-center of the whiteboard (or on flip chart taped above the main row)
- Write each major deliverable on a 6x9 blue-colored Post-It note and post it to one deliverable per flip chart page.
- Lay out the yellow, blue, and pink 3x3 Post-Its for each team member.
- Provide a black permanent marker (medium tip) for each team member.
- Print and provide a copy of the Simplified Project Charter, one per team member.

Orient the Team - Review the Project Charter

During the Chart the Course step, you would have socialized the charter draft with some or all of your team members. However, to ensure everyone is on the same page going into the planning session, the group will now review the charter together.

Part 1: Review the project goal statement

Have each team member read the project goal statement from the charter. Ask if any questions about the goal before the team gets started with the planning session. Address any questions raised by the team.

Part 2: Review the project scope

Have each team member read the scope section of the project. After each has read that section, show team how each In-Scope item is represented on the 6x9 blue Post-It notes on the wall. Briefly review the Out-of-Scope section and validate that while some of those items may be great ideas, for the purpose of this project and this planning session, these items are out-of-scope. No discussion or time will be spent on these items today.

Part 3: Review the milestones

Briefly review the milestone list and dates so that team is aware of these as they participate in the planning session exercise.

Part 4: Review the assumptions

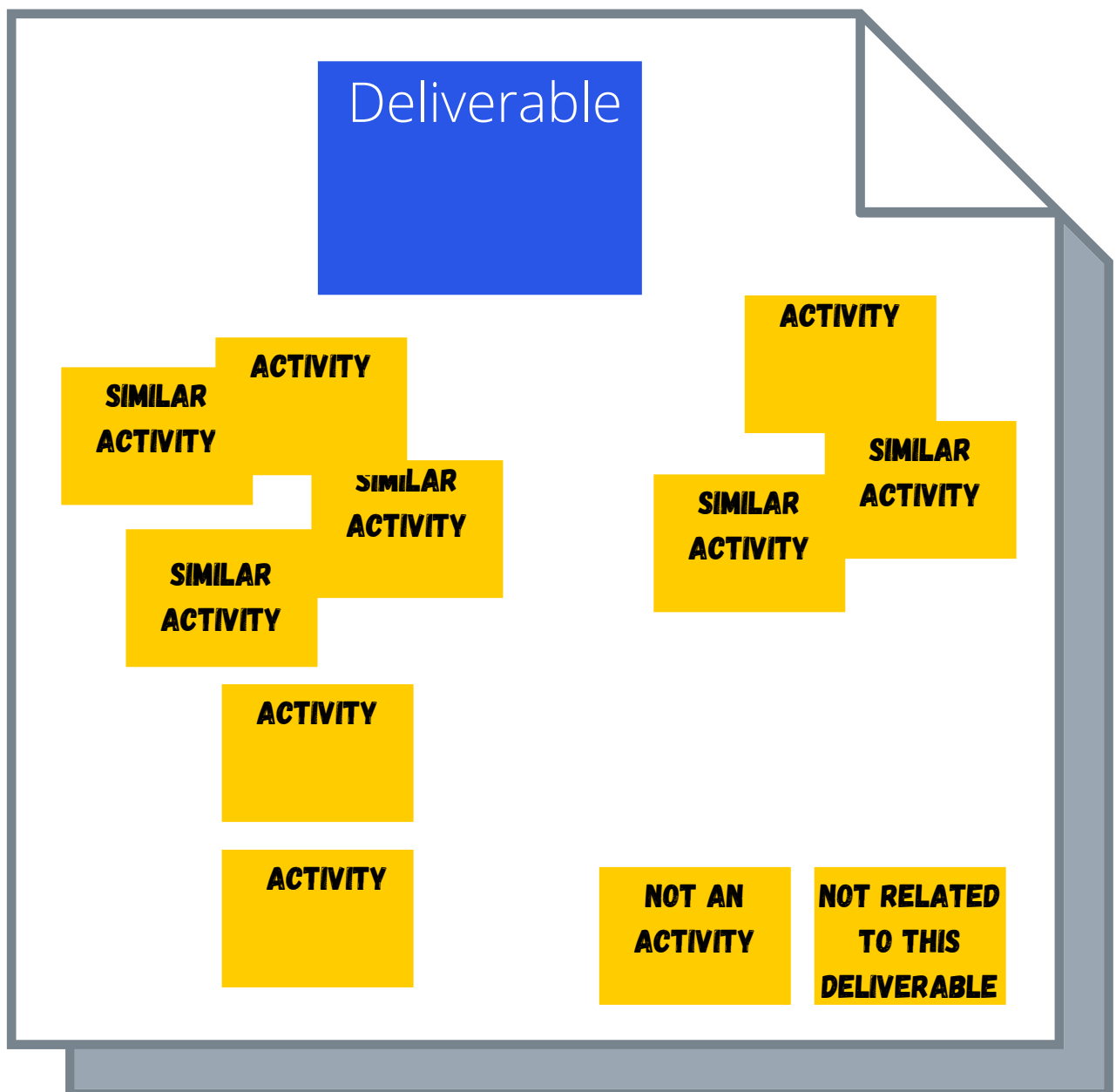
Briefly review the key assumptions section, notifying team that they can assume these assumptions are true during today's planning session exercise. If any person has concerns about one or more assumptions, simply validate their feeling and explain that another session can occur some other day to review those concerns.

Apply the Method - Work Breakdown for All Deliverables

Repeat the instructions for each deliverable, focusing on one deliverable at a time.

Next instructions provided to group.

- Everyone grab a permanent marker and yellow sticky notes pad.
- For the next major deliverable from your project - we will brainstorm what activities we need to complete to achieve that deliverable.
- Ask for and address any questions the team has about the definition of the deliverable.
- Explain that the team will have 2-3 minutes to brainstorm activities.
- Check if everyone is ready, addressing any questions about the brainstorm exercise.
- Announce... "Ready... Go!"

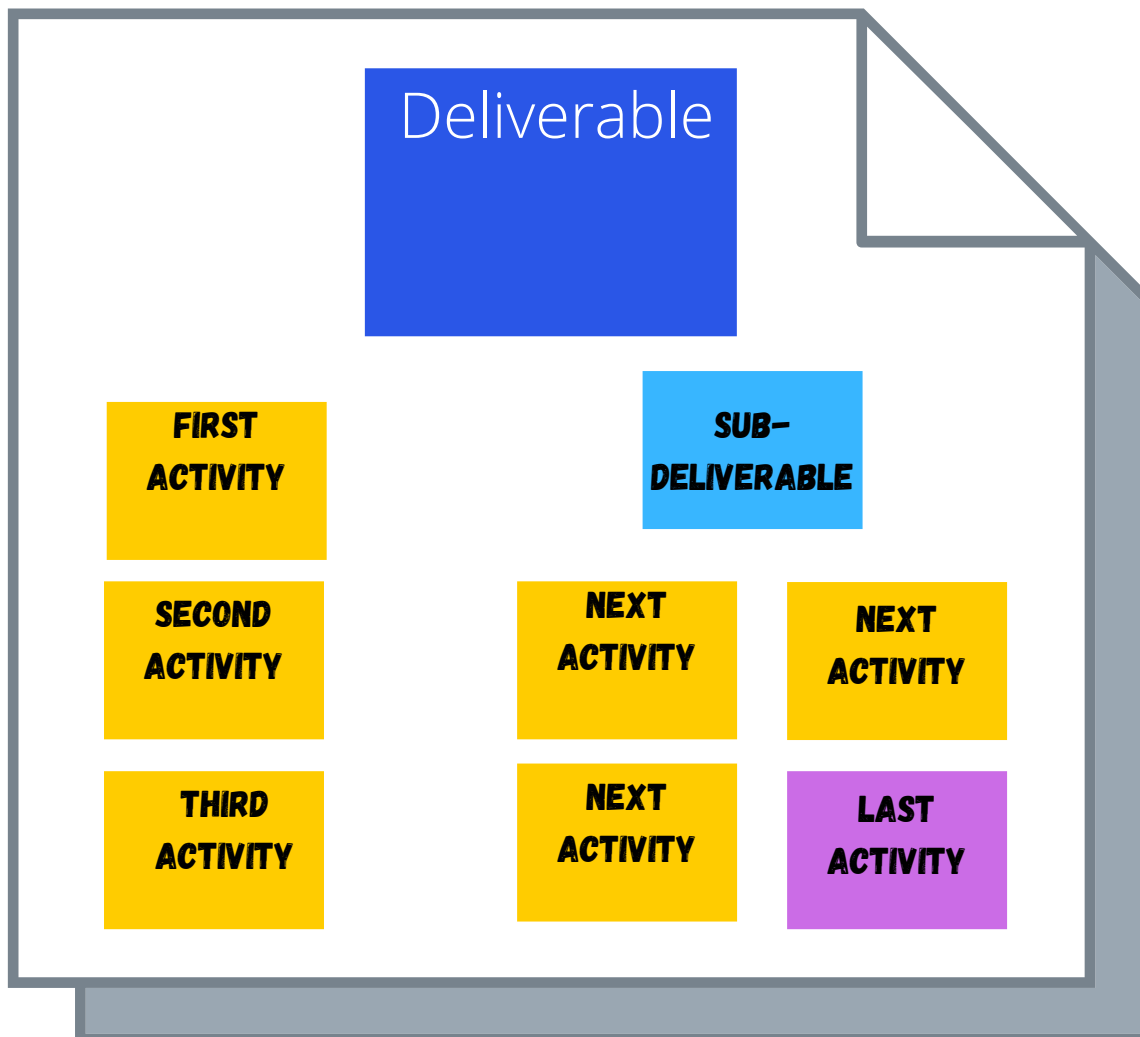


Apply the Method - Work Breakdown for All Deliverables

As before, work with the team to rewrite the similar activities into a discreet set of activities. Then, as a team, determine in which order the activities should be completed.

To close out the work breakdown for each major deliverable, help the team apply these best practices.

- Sort activities in columns to represent activities that relate closely to each other.
- Use 3x3 blue sticky note to represent a sub-deliverable by which you can group activities.
- Identify the last activity that will be conducted that verifies deliverable is achieved.



After each deliverable is broken down into the discreet set of activities, announce that the breakdown for that activity is complete. Then, intentionally repeat the instructions for the next deliverable and start the 2-3 minute timer. This helps the team context switch between each deliverable.

PL

T1

T2

T3

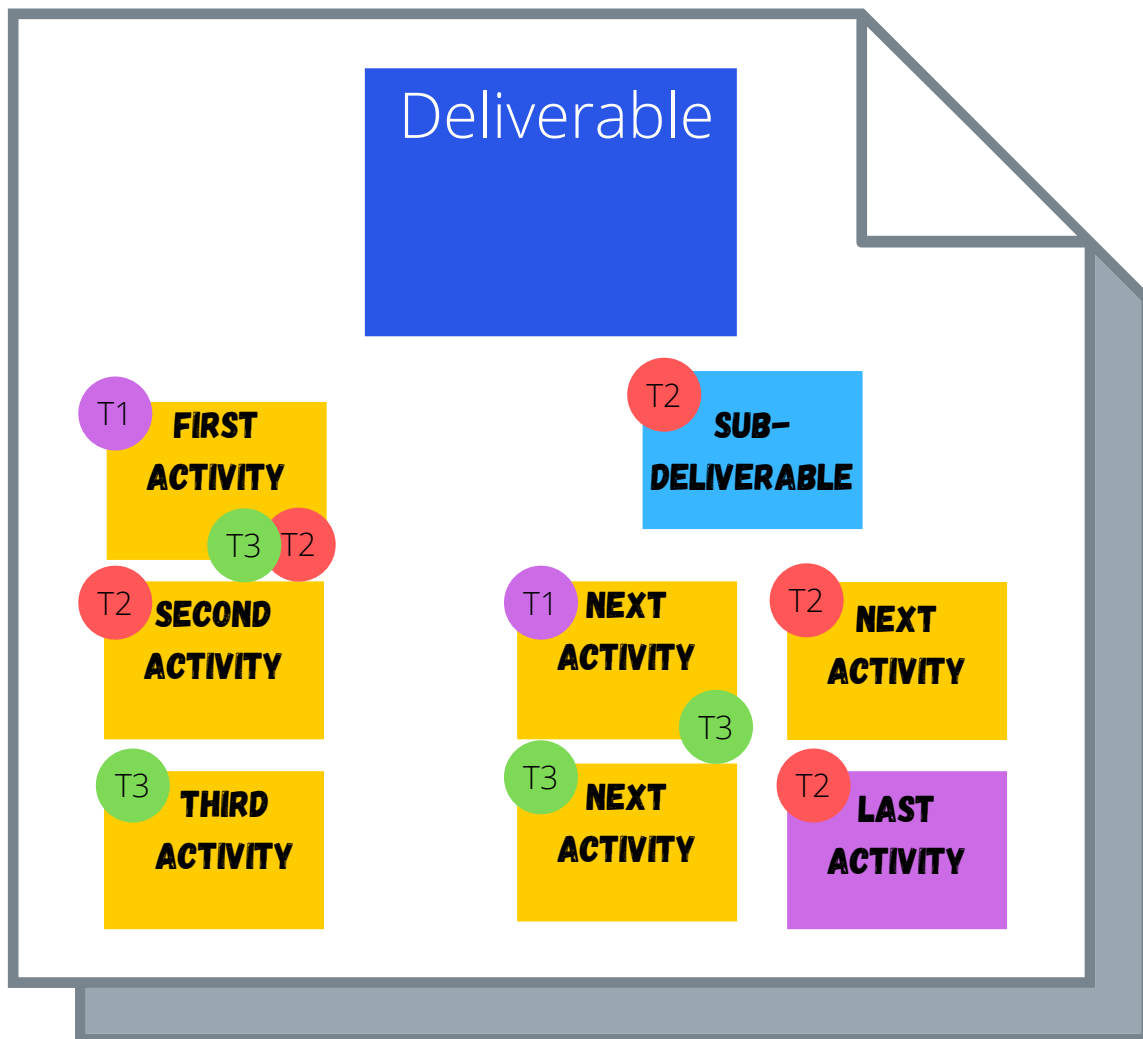
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Apply the Method - Assign Owners & Identify Collaborators

As before, work with the team to assign owners and identify collaborators for each of the activities under each deliverable.

Friendly Reminders

- Assign only one owner per deliverable
- Every activity must be assigned an owner
- Not every activity needs collaborators
- Identify collaborator(s) who will directly contribute to the activity
- Do not include "interested-only" individuals as collaborators.



As the team conducts this exercise, it is common for the team to identify new activities or sub-deliverables they missed before. If this occurs, simply add that activity and complete the assign owner & identify collaborators exercise accordingly.