



Portfolio-Engineering
the right projects, done right

Planning Processes Overview

Determining Your Course

Version 1.00
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Planning Processes Overview

Prerequisites

Portfolio-Engineering recommends reviewing the following materials before considering **Initiating Processes Overview**:

- Introduction to Project Management
- Snakes and Ladders
- Initiating Processes Overview
- Importance of Project Planning



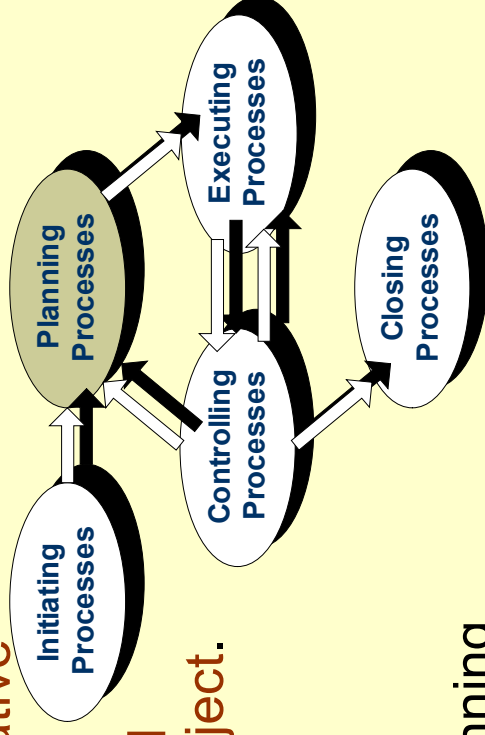
Planning Processes Overview

Planning Processes

Planning is about refining your objectives, identifying and analyzing potential project / product approaches (within given constraints) and selecting the alternative that best satisfies the objectives.

Planning is about understanding and communicating the details of the project. More importantly, through planning commitment is finalized with all stakeholders.

While it is easy to conceptualize planning has happening only once and very early in the project life cycle, in reality, **planning is an on-going effort.**

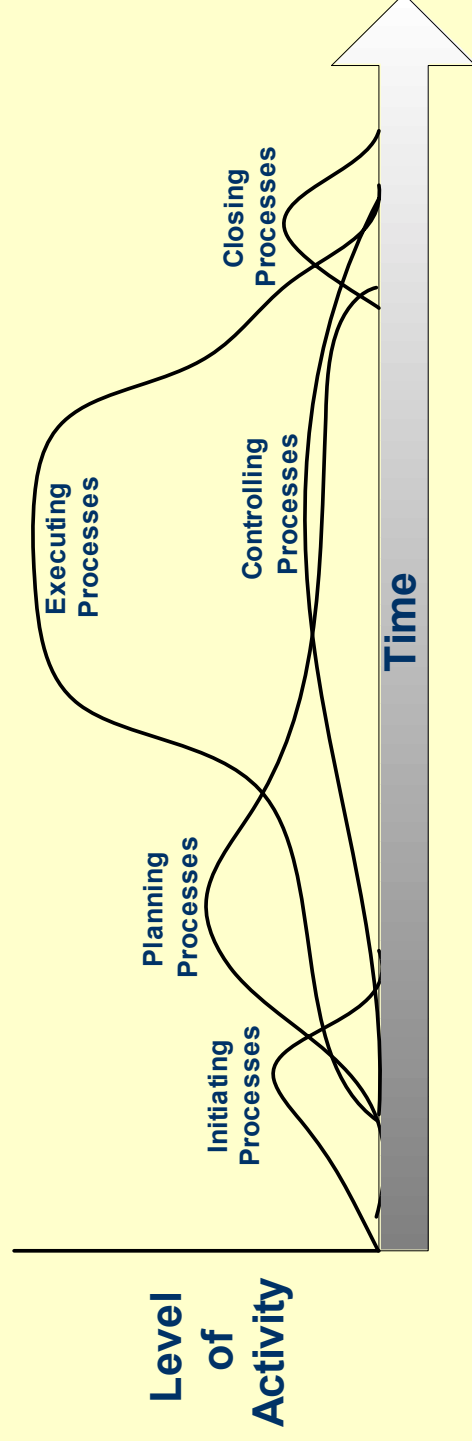


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Planning Processes Overview

Planning Processes

Planning may involve more of the Project Manager's time than most of the other processes. More than half of the PMBOK processes are related to planning. However, project management is not primarily planning and planning should be commensurate with the scope of the project and the usefulness of the information developed during planning.



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Planning Processes Overview

Planning Processes Abstract

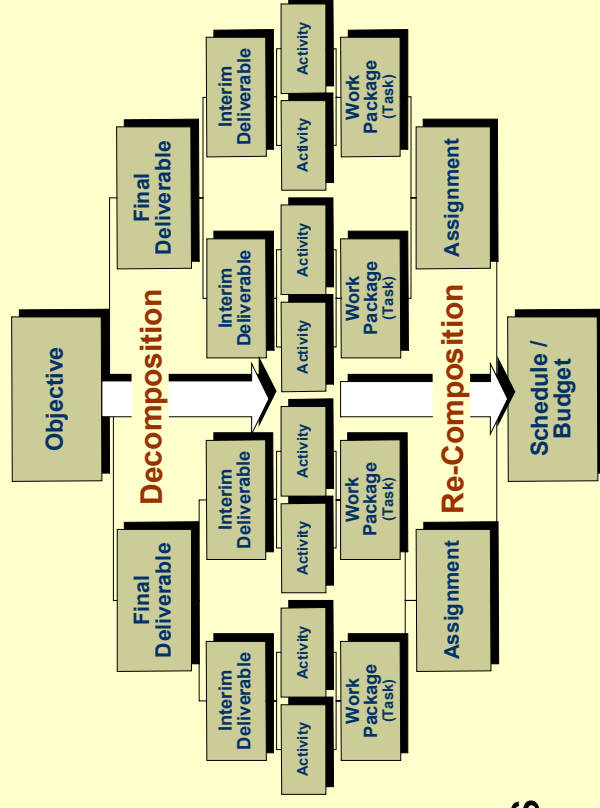
Planning is a process of...

Decomposition (planning approach)

- Deliverables to meet objective
- Interim deliverables required to create final deliverables
- Activities to create interim deliverables

Re-Composition (detailing cost and time)

- Activity estimates and relationships form work packages
- Responsibility creates assignments
- Calculate schedules and budgets

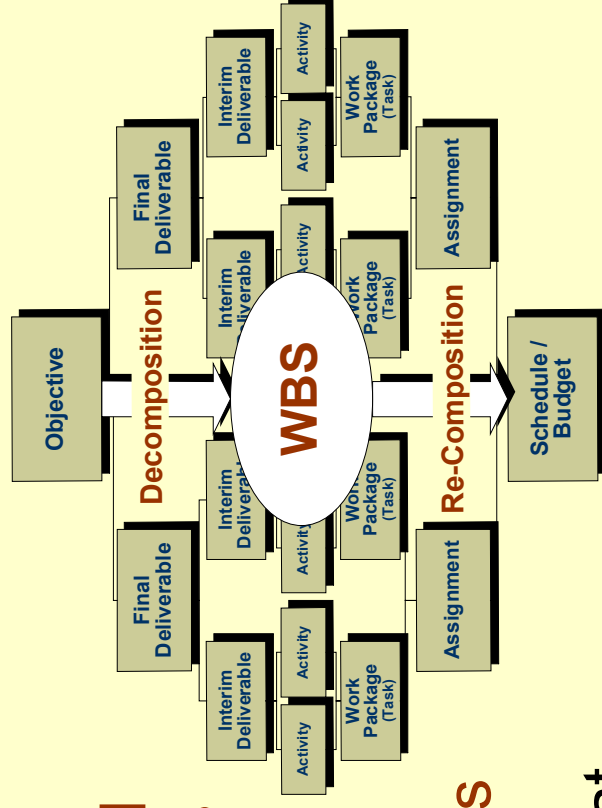


Planning Processes Overview

Work Breakdown Structure (WBS) is the Core of the Planning Process

WBS represents the complexity of the entire project in a detailed way. Using the WBS as a basis for planning and estimating is a bottom-up planning technique (as opposed to top down).

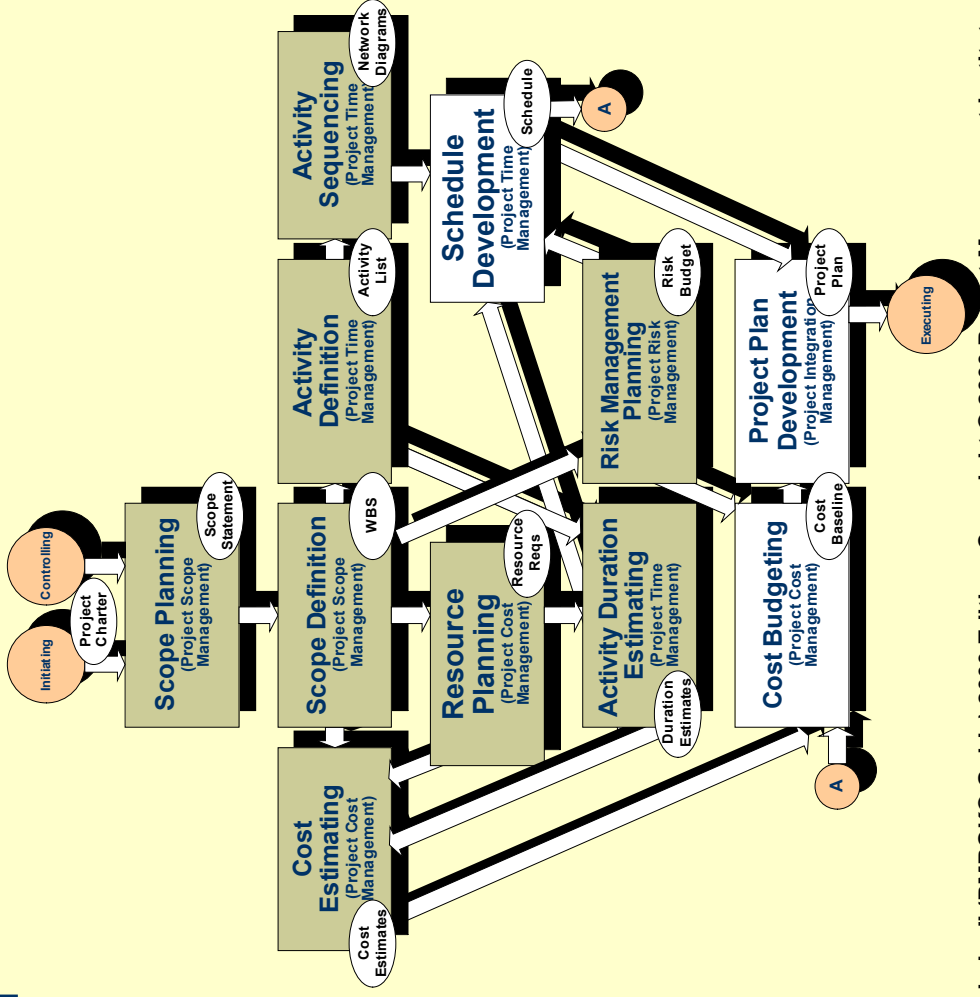
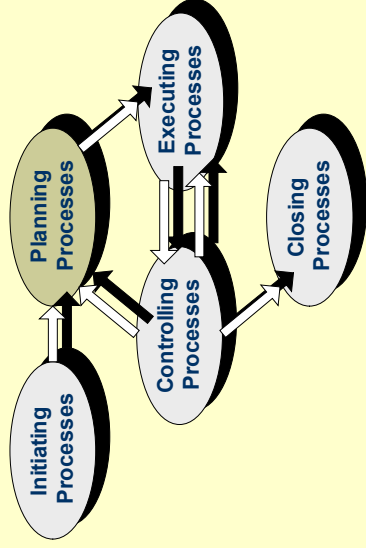
Bottom-up estimating techniques create the most accurate estimates and produce plans that allow for close project control.



Planning Processes Overview

Planning Group Core Processes

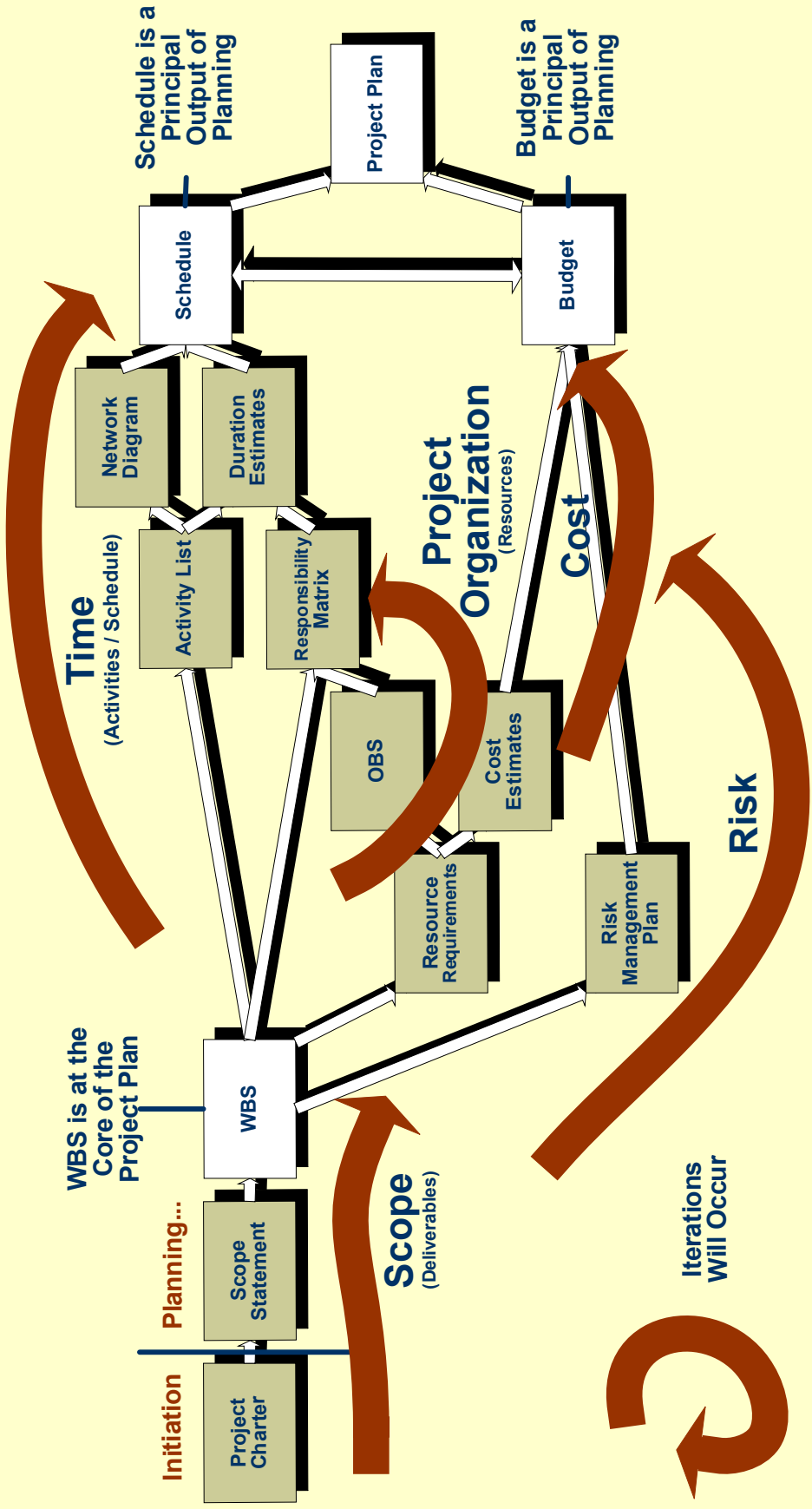
Many of the processes within planning are considered **core processes**. Notice that they have **clear dependencies**, they are **each linked by a significant deliverable**.



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Planning Processes Overview

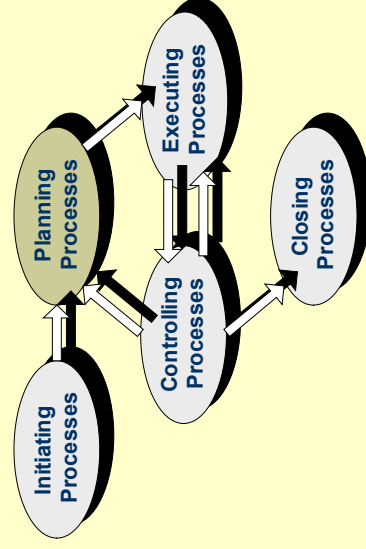
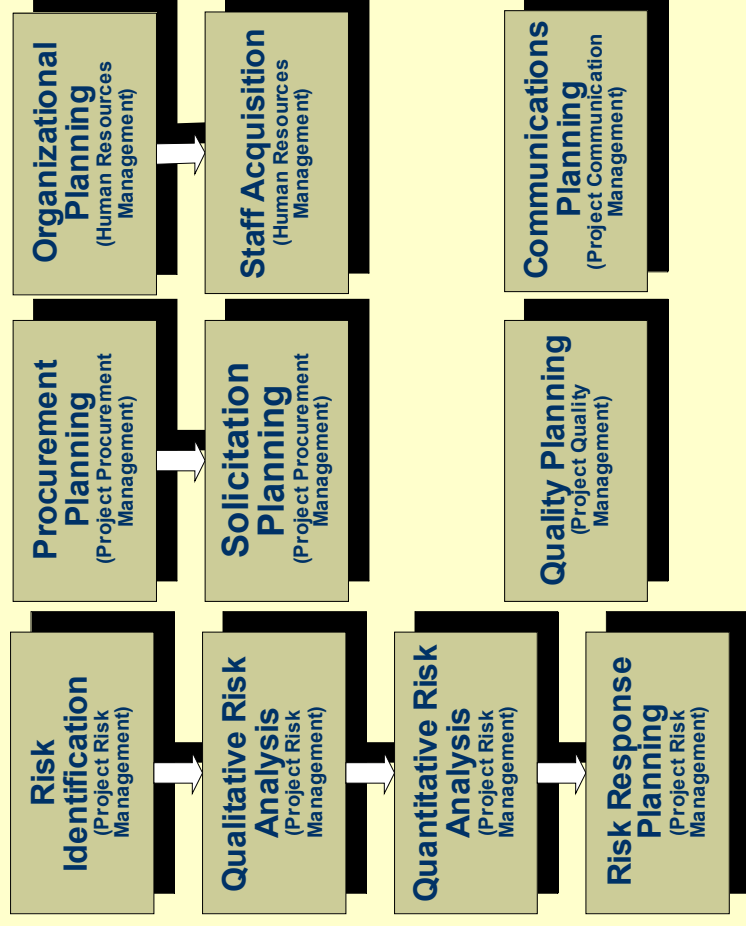
Flow of Planning Core Deliverables



Planning Processes Overview

Planning Group Facilitating Processes

Many of the planning processes are considered **facilitating processes**. These are **essential but performed when necessary as they are not linked to the core processes through a significant deliverable.**

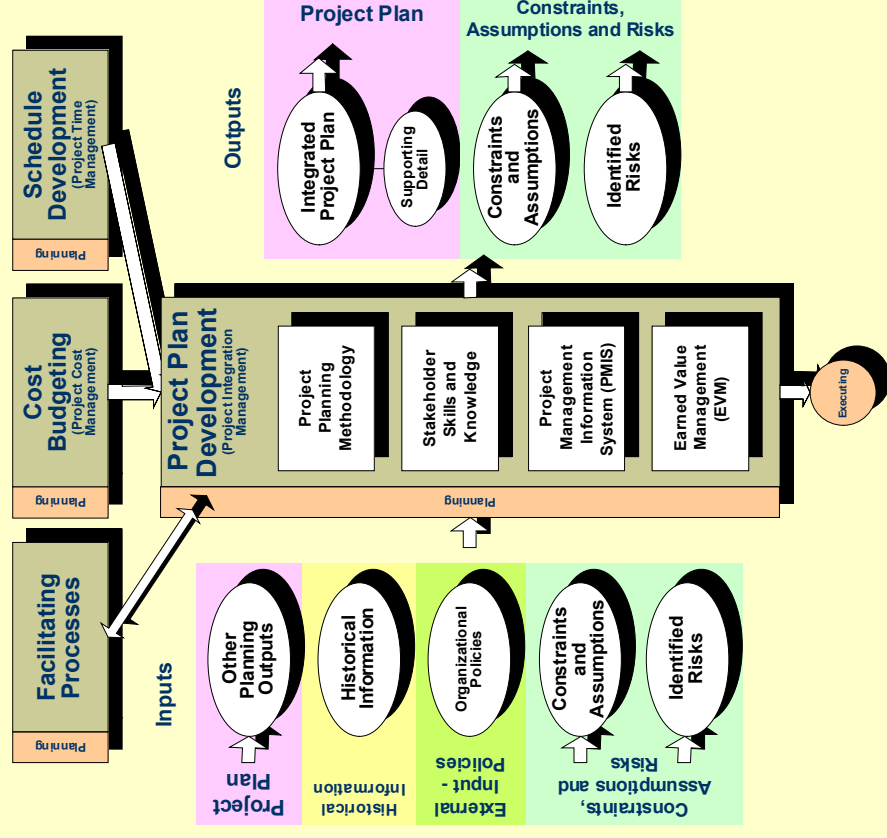


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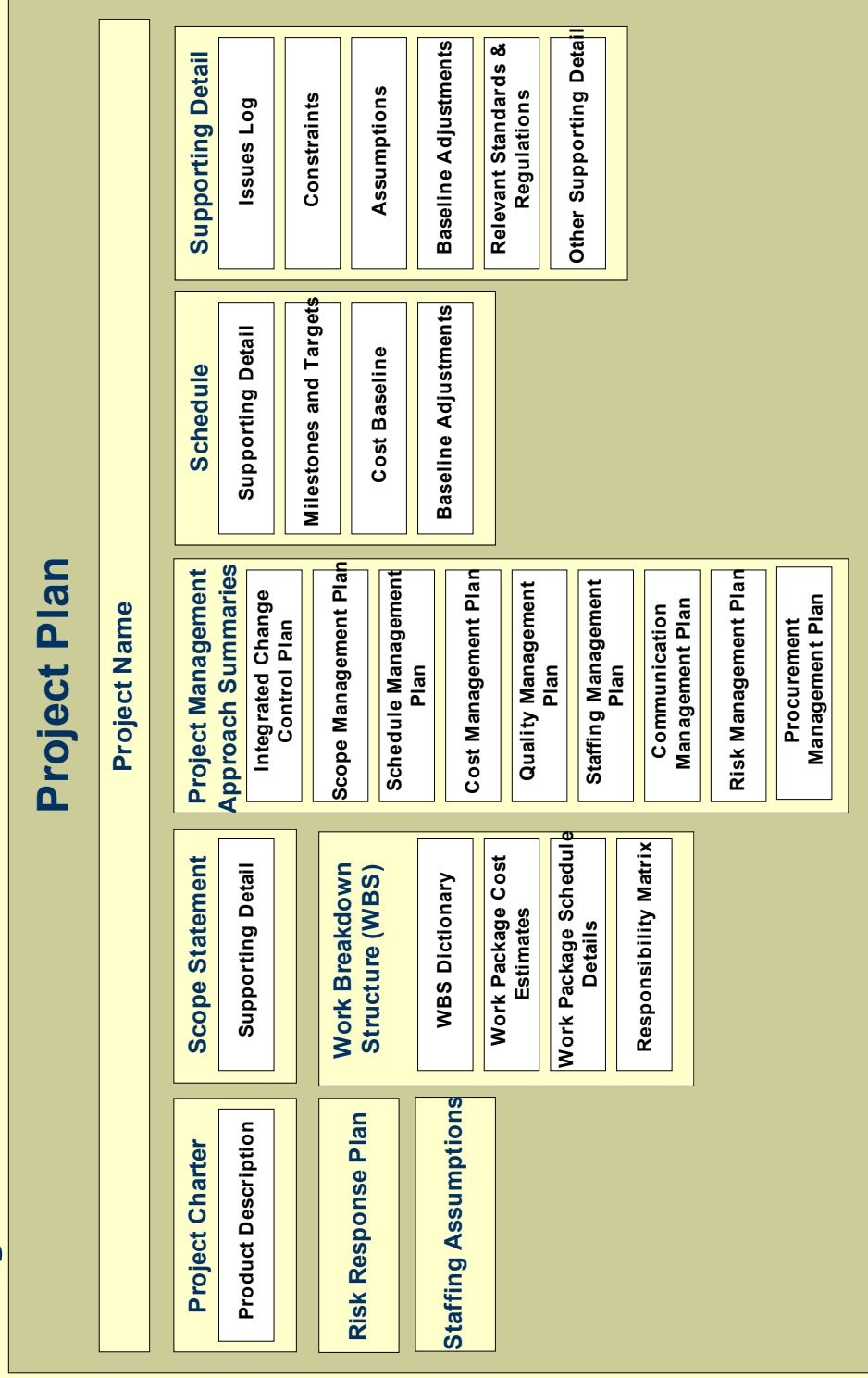
Project Plan Development

As the final planning process, Project Plan Development is the process that combines the project budget and schedule (the final core process deliverables) with the outputs of all of the other planning processes (including strategic planning and the facilitating processes) and develops a comprehensive project plan.



Planning Processes Overview

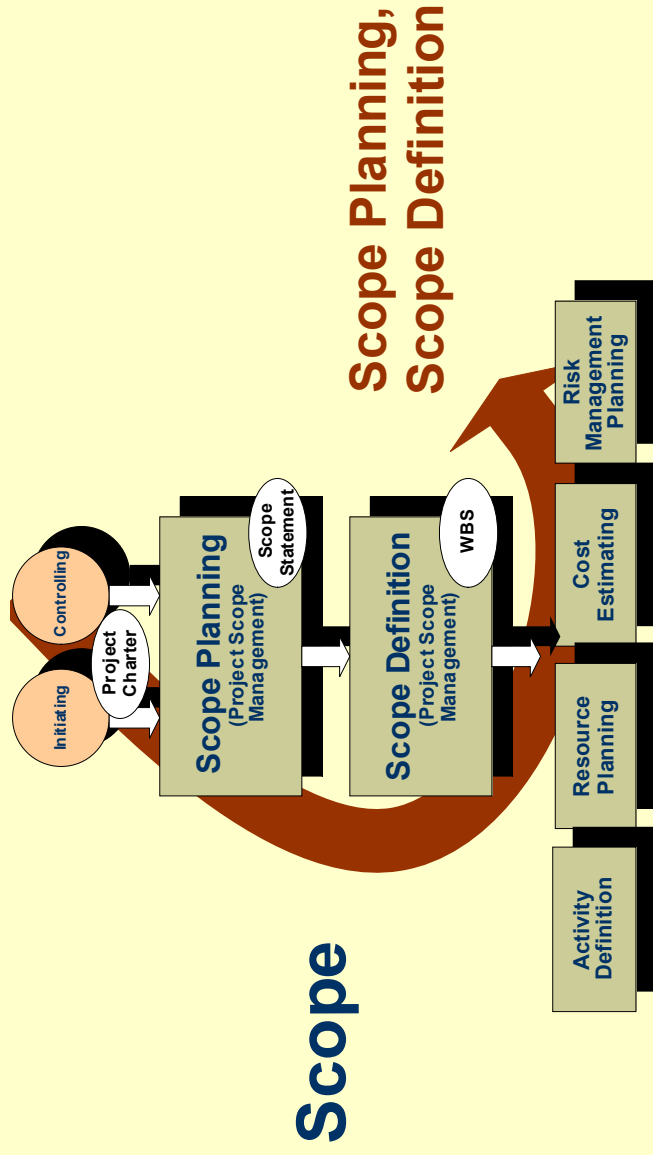
Project Plan



Planning Processes Overview

Next Steps – Scope

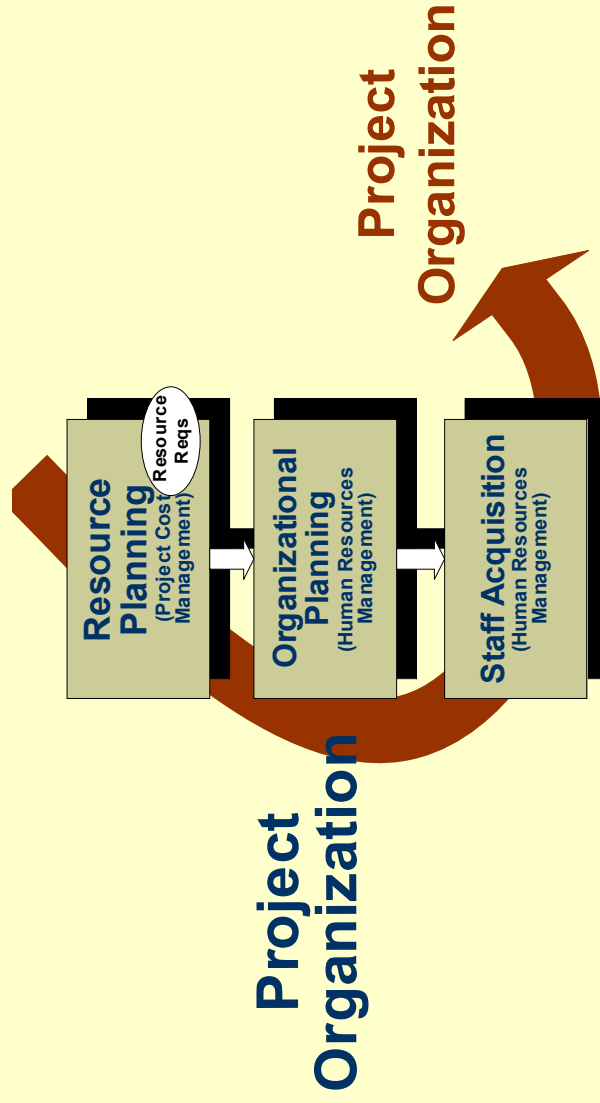
For additional information, Portfolio-Engineering recommends reviewing the following related materials:



Planning Processes Overview

Next Steps – Project Organization

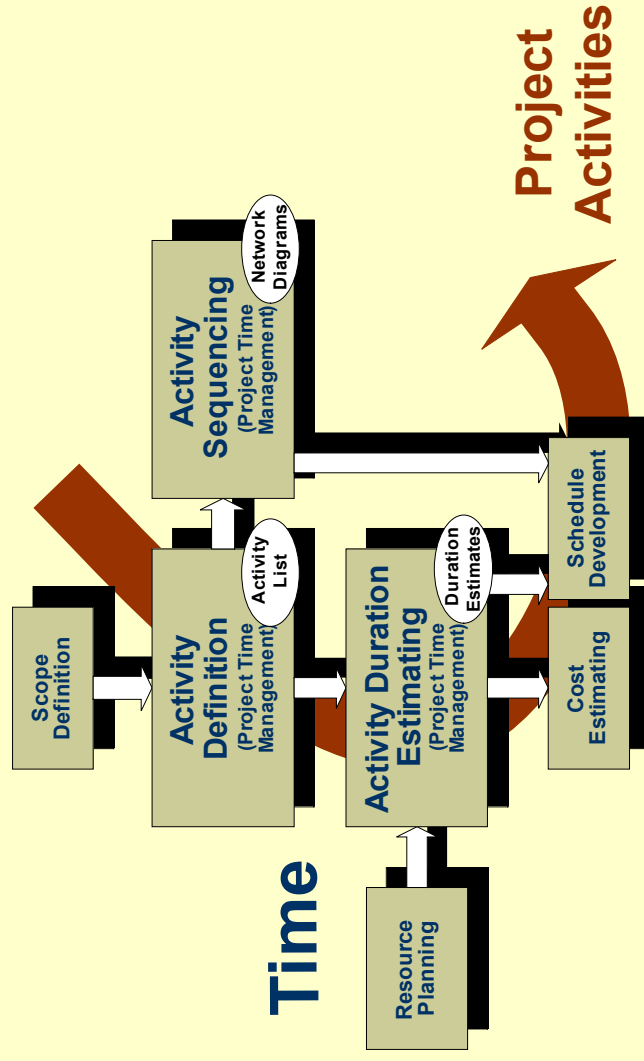
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Planning Processes Overview

Next Steps – Time / Activities

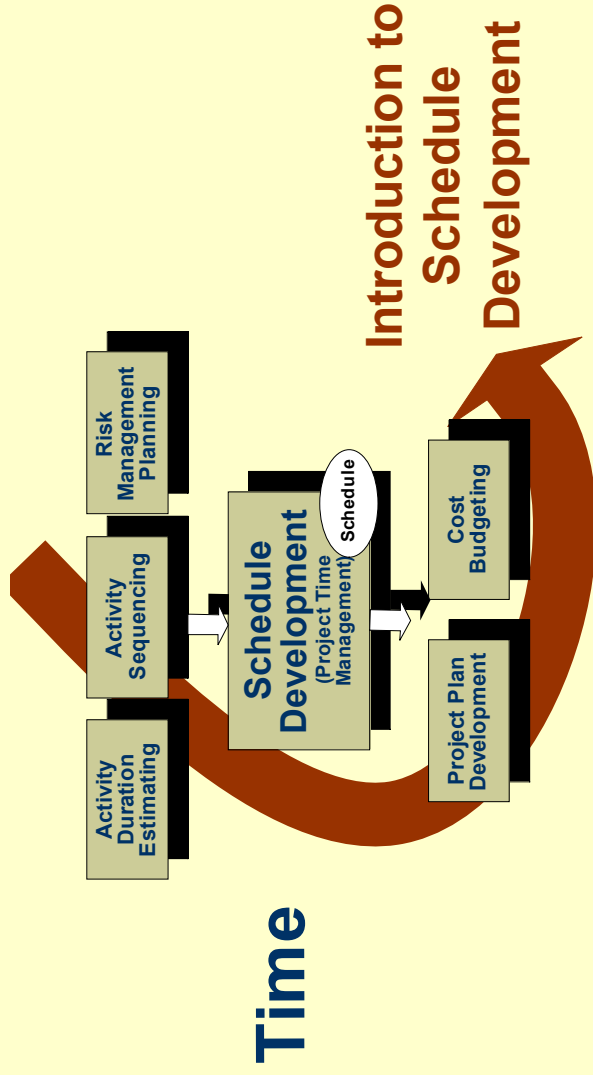
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Planning Processes Overview

Next Steps – Time / Schedule

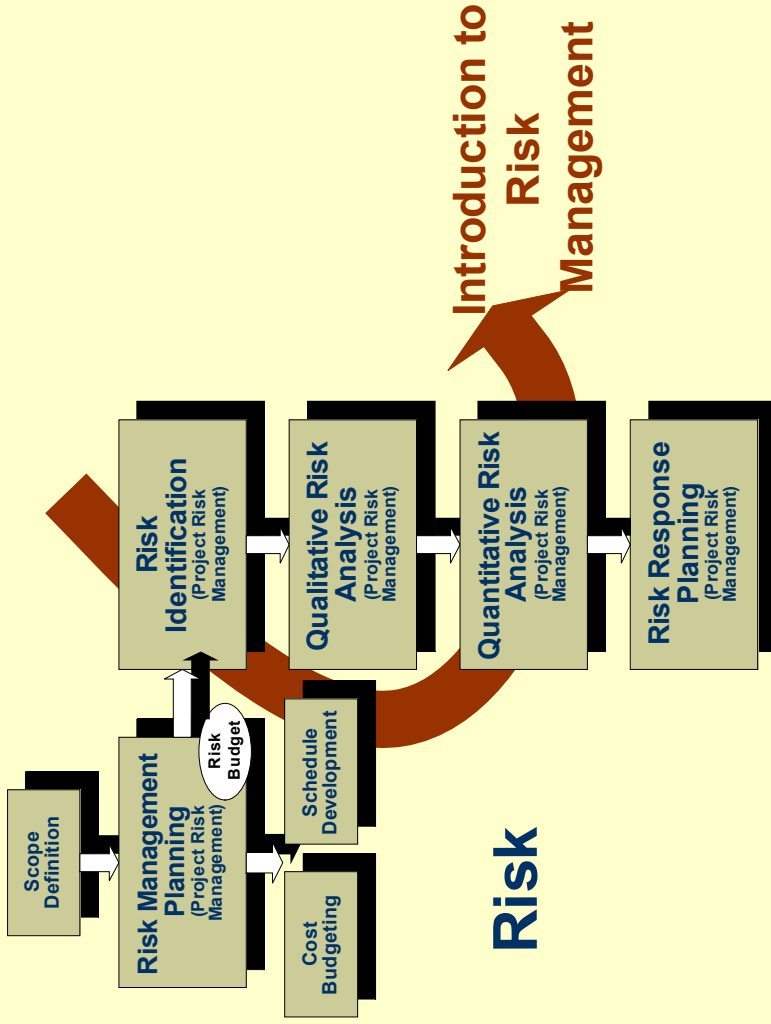
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Planning Processes Overview

Next Steps - Risk

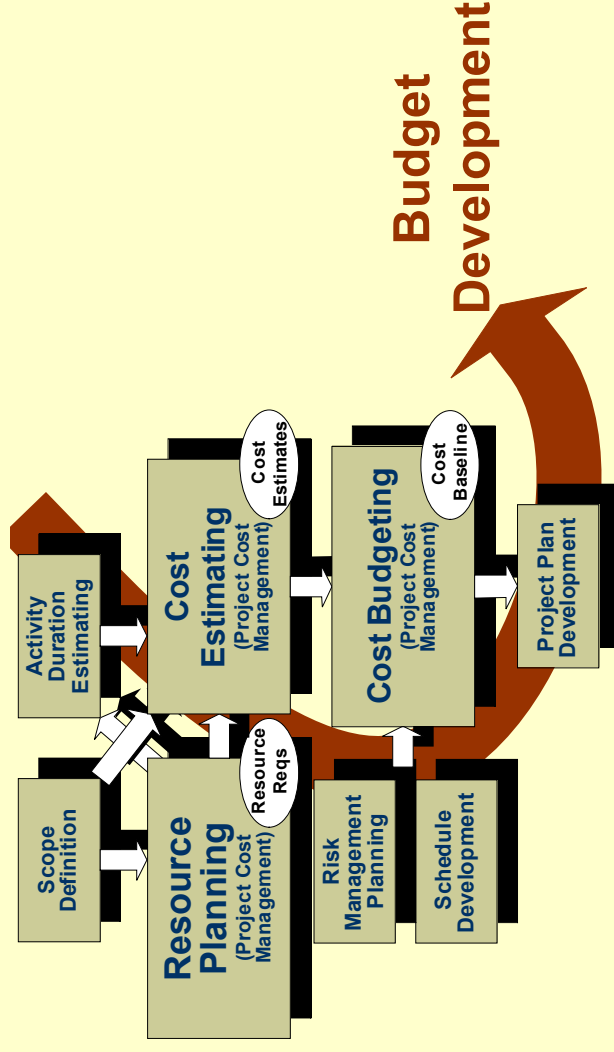
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Planning Processes Overview

Next Steps - Cost

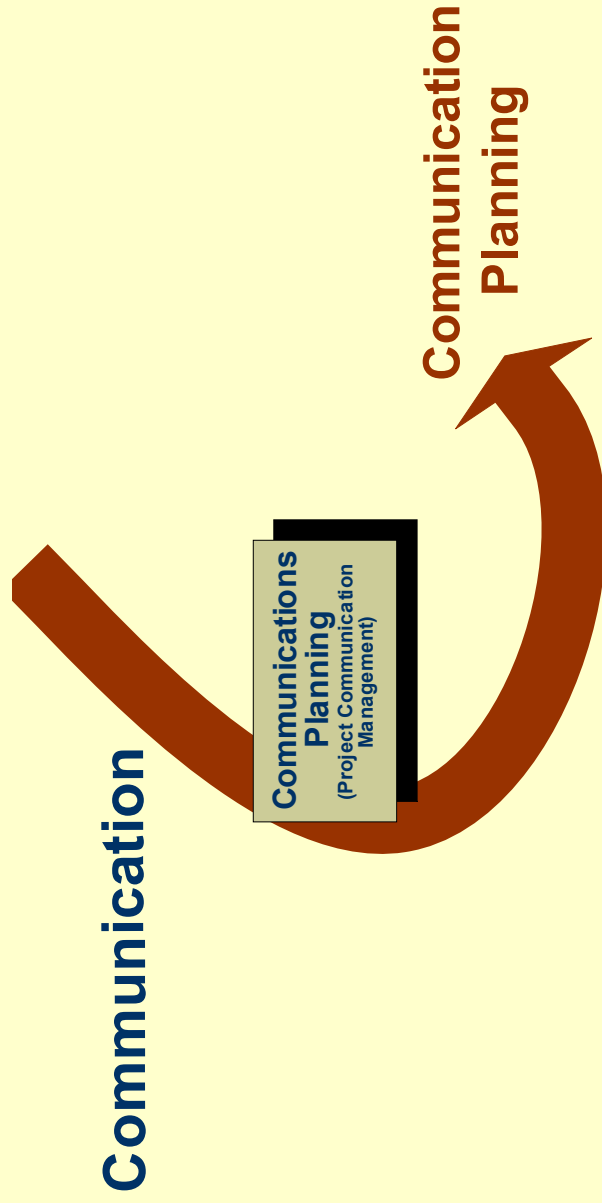
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Planning Processes Overview

Next Steps – Communication

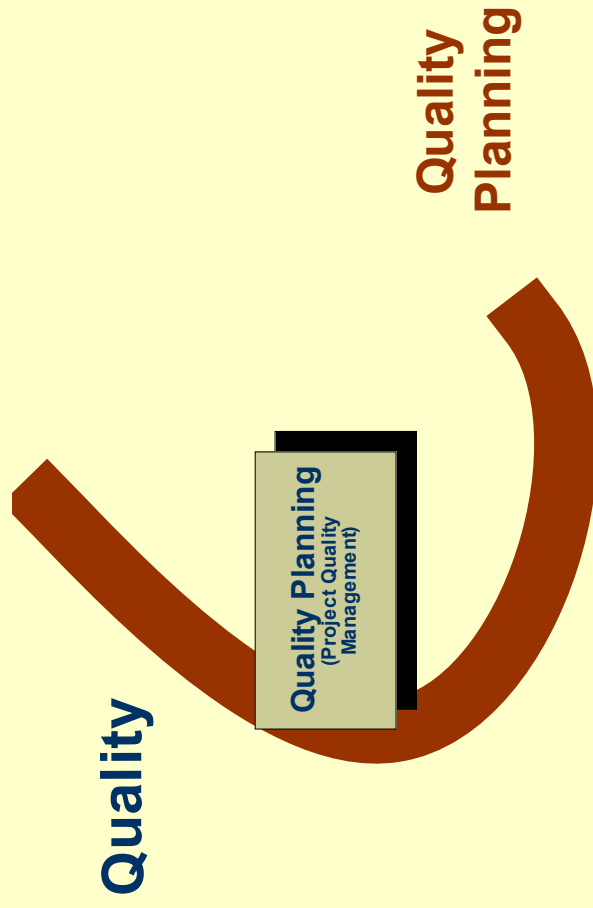
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Planning Processes Overview

Next Steps – Quality

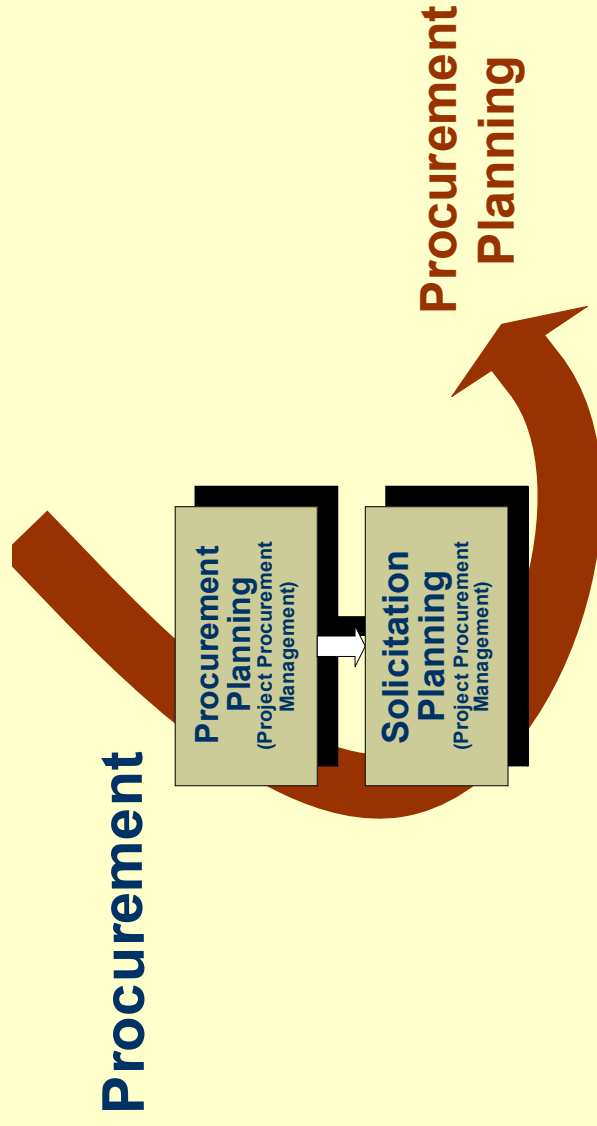
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Planning Processes Overview

Next Steps – Procurement

For additional information, Portfolio-Engineering recommends reviewing the following related materials:



Planning Processes Overview

Next Steps

Portfolio-Engineering recommends reviewing the following related materials:

- Project Manager, Project Plan
- Earned Value Management



Planning Processes Overview

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