For Training Project Management

The Detailed Project Plan

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This article was originally published in Svenson & Wallace, Inc.'s Management Update *newsletter, summer 1992.*

I believe that trainers need to plan well to help ensure that a training project meets all of the internal training organization's and external customer's criteria. However, many trainers resist developing plans detailing their projects. The rationale? The plan is too subject to change to be worth the effort of planning at a detailed level.

My personal view is that most (not all) Project Plans that are subject to many changes were probably not very good plans in the first place. Or, if they were good training Project Plans, they were poorly sold to the customer, and changes occurred because they were not the *customer's* plan as well.

It's fact that many trainers either avoid making detailed plans or making any plans at all. However, I *believe* in detailed planning because the process forces me to think through

- All of the key tasks required
- The prerequisite activities for key tasks
- The key outputs/deliverables

These are critical for the planning process.

With a good plan, I can better anticipate potential issues and problems. I can build strategies and tactics right into the plan to preemptively deal with those issues and problems. My Project Plan is critical for spelling out the details of the intended project—all the whats, whens, wheres, whos, and whys.

Most trainers are able to conduct a detailed task analysis; they should very easily be able to construct a detailed list of tasks to conduct one of their *own* projects. A trainer could even pretend to be conducting a task analysis exercise on him- or herself, being both interviewer and interviewee.

What is a detailed plan good for? It can

- Provide direction to all personnel involved in the project, including the customer's personnel.
- Allow tracking of the planned schedule and costs in close to real time.
- Help the project get back on track if something starts to derail it.

Most importantly, if approached correctly the planning process can be used to get customer buy-in. The best way to do this is to create a rough draft of the plan after obtaining the customer's input. Let the customer review and edit the plan. Let the customer own the plan. We should think of the project as the *customer's* project and ourselves as *implementers* of the project.

Eight Sections of a Detailed Project Plan

The Project Plan should contain the information described in the eight sections below. The content can be organized and presented in many different manners, but plans containing this kind of detail have served us well as we've completed training projects over the years.

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Narratives

1. Purpose

2. Background

3. Scope

4. Approach

5. Project Phases and Milestones

6. Outputs/Deliverables

7. Roles and Responsibilities

8. Project Tasks/Roles/ Schedule

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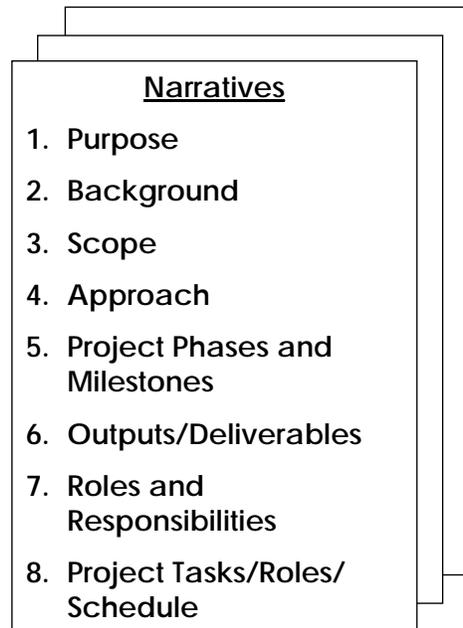
Figure 1: The Eight Sections of a Detailed Project Plan

1. Purpose

This section deals with the *what* of the project. It presents a very short statement reflecting the ultimate end objective(s) for the project, expressed in a manner such as, "The purpose of the proposed project is to . . . (fill in the blank)."

2. Background

This section expands on the rationale for conducting the project, the *why*. Why this project, why now, why for this target audience(s), etc.? This section usually ties the project to the business conditions and initiatives driving the project.

3. Scope

This section identifies the *who* of the project, the target audience(s) that will be addressed. It also establishes the breadth and width of the project, including the project boundaries. The scope must be well understood early in the project so as not to create false expectations.

It is vital that this section of the plan be easily understood by all customer segments (including executive management). Poorly managed customer expectations at this early stage almost certainly guarantee disappointments at the end of the project.

4. Approach

This section outlines the various methodologies and mechanics to be employed in conducting the project. What is the general or primary method to be used? What are the secondary methods? How will these methods be used—for data gathering, data reviews, design efforts, design reviews, etc.? If you intend to use surveys, individual interviews, group-process interviews, document reviews, and so forth, spell those out here. Use this section to avoid surprises as to how you conduct the project.

5. Project Phases and Milestones

This section provides an overview of the phases and milestones used in the Project Plan. We use the six phases shown in the diagram below.

MCD Phase 1	MCD Phase 2	MCD Phase 3	MCD Phase 4	MCD Phase 5	MCD Phase 6
Project Planning & Kick-off	Analysis	Design	Development/ Acquisition	Pilot Test	Revision & Release

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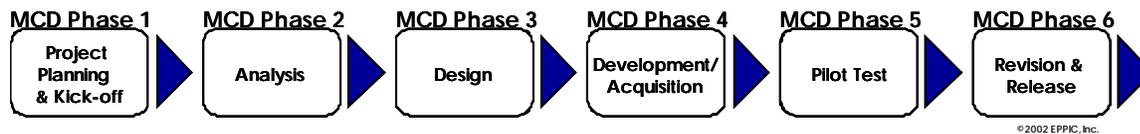
Figure 2: Project Phases (Section 5)

Shown in this way, it's apparent that we're dealing with a process. Our detailed plans are one way we maintain control over the course development process, specifically control over

- Quality
- Cost
- Schedule

In fact, we use detailed plans in *all* our projects, not just for training development projects.

6. Outputs/Deliverables

This section outlines the specific, key outputs to be produced during the project. A detailed description of each output should be included. The use of the output during the project and after the project should be spelled out.

7. Roles and Responsibilities

This section presents the roles and corresponding responsibilities for all groups or teams involved in the project. Typical roles and responsibilities are shown in the sample page for Section 8 on the following page. (Of course, not all projects are organized by group or team. In those cases, the roles would be changed and the responsibilities assigned to other individuals or parties.)

8. Project Tasks/Roles/Schedule

For all project phases, this section presents the project tasks, estimated time requirements per role, and the estimated schedule for tasks. A sample page from this section is shown below.

| Project Tasks | Estimated Days Required | | | | | | | Schedule | |
| | EPPIC, Inc. | | | TMC Corporation | | | | | |
	GW	PH	PS	PM	PT	PP	Other (each)	Start	End
1. Identify, contact, and recruit three to five "Project Team" members for the Working Committee to provide input, critique, and support to the Analysis, Design, Development, and Pilot Testing effort	–	–	–	2.0	–	–	–		
2. Coordinate logistics for Task 4 • Room arrangements • Equipment arrangements • Invitations and information to attendees • Meal/refreshments • Final confirmation of invited attendees' intentions to attend	0.25	–	–	1.0	–	–	–		
3. Prepare to conduct Task 4 • Meeting process design • Presentation preparation • "Straw" models/starter prototypes for use in Task 4	1.0	2.0	2.0	–	–	–	–		

KEY: EPPIC, Inc.   TMC Corporation
          GW = Guy Wallace   PM = Project manager
          PH = Pete Hybert   PT = Project Team
          PS = Production Support   PP = Pilot Participants

Figure 3: Sample Page, Plan Section 8

Is Detailed Planning for You?

Our clients have told us that our planning process is one of the things that differentiates us from other consulting and training organizations. In fact, some clients have adapted this approach and format for their own use.

In our experience, the detailed Project Plan serves trainers well. It can help trainers and customers alike come to a clear, consensus view of the project and its intent.

My advice? Plan for the details. Plan for execution. Plan for *success.*