

# **Bite-Sized Training™** **Planning Small Projects**



# Planning Small Projects Bite-Sized Training

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## Introduction

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At some point, you've probably been faced with managing a small project. Whether it's putting together a product design proposal, or reorganizing the file systems in the office, projects are ongoing all the time.

Everyone has a healthy respect for large projects and the degree of planning that is done to make them a success. Small projects require the same type of consideration. The scale will be different and the process will be less complex, however, the principles will be the same - the key principle being the importance of planning.

With small projects it's tempting to skip the planning phase and dive right into execution. This is especially true if the nature of the work you're doing is familiar and similar to things you've done in the past.

This can be a big mistake; whether a project is big or small makes no difference to the end user and other stakeholders. Their interest is that the project is executed properly. When you fail to plan, you risk missing critical steps, doing things

out of sequence, and causing costly mistakes that require additional resources to fix.

While many of the tools and frameworks used in large project management are too complex and time-consuming for small projects, you do need to plan effectively. You don't want to waste time completing steps that aren't necessary. What you need is a method that focuses on the critical elements of planning.

This **Bite-Sized Training™** session shows you just that. We've put together a group of concise, easy to use planning tools that will help you deliver great results on small projects efficiently.

In this session, you'll learn:

- To focus on the essentials by using Action Plans.
- How to create a Work Breakdown Structure to fill in the details.
- How to create a simple Gantt Chart to schedule events and create a timeline.



# 1. Action Planning

With big projects, you have lots of formal techniques and specialized software programs to use. These are designed to help you keep all the pieces organized and everything working smoothly.

With small projects, however, the expectation is that you have most of the information in your head, and all you have to do is come up with a simple way to organize it.

There's no time or budget to create a project charter or analyze your critical path. (There's also no need!) What you want is a simple, clear, and concise plan that defines what needs to be done - by whom, and by when.

**Tip:**

For more on planning larger projects, see our articles on The Planning Cycle ([http://www.mindtools.com/community/pages/article/newPPM\\_05.php](http://www.mindtools.com/community/pages/article/newPPM_05.php)) and Project Management Phases and Processes ([http://www.mindtools.com/community/pages/article/newPPM\\_63.php](http://www.mindtools.com/community/pages/article/newPPM_63.php)).

The fastest and most efficient way to get started is by building an action plan. This is just a list of the tasks that you need to complete to reach your project goal.

**Action:** Think of a small project you're working on now, or that you'll be doing in the future. Brainstorm a list of all the things you need to do the project to be a success. Use the SCHEMES mnemonic (detailed below) to help you think about what needs to be done.

- **S**pace.
- **C**ash.
- **H**elp.
- **E**quipment.
- **M**aterials.
- **E**xpertise.
- **S**ystems.

**Note:** Not all projects will have considerations in each category. This mnemonic simply helps you remember all key tasks.

Record your ideas in the table below:

## Space Considerations

## Cash Considerations

**Helpers/People Considerations**

**Equipment Considerations**

**Materials Considerations**

**Expertise Considerations**

**Systems Considerations**

What you have just compiled is a basic outline of what needs to be done to ensure that your project is completed successfully. Lots of people stop their planning activities here and dive into getting things done.

The problem is, you haven't put any order to your ideas. More than likely, you have some actions

listed that are related to one another. It can be helpful to identify and understand these relationships as you move into ordering and scheduling your activities.

A useful tool to help you discover these relationships is a Work Breakdown Structure - we'll look at this in the next section.

## 2. Work Breakdown Structures

Now that you have a good idea of what needs to be done, you can start putting some shape to your overall plan.

Many of the items represented in your action plan are actually mini projects themselves. Each of these needs to be broken down into small, actionable steps. You may have already identified

a few of these specific actions, and others may still be at a higher level and need to be broken down.

To fill in this detail, you need to develop a Work Breakdown Structure (WBS). This organizes the activities from the action plan. It's commonly represented as a tree structure as shown below:

### Three-Layer Work Breakdown Structure



Each work package is broken down into actionable steps. Where necessary those steps can be broken down into smaller steps and so on.

**Action:** Look at the items in your action plan and identify common themes, or work packages that you need to be working on.

For example, if you were re-organizing a filing system, your themes might be:

- Secure permissions.
- Purchase materials.
- Make the move.
- Develop a policy.

Write the themes for your example project down in the table on the next page.



Themes
1.
2.
3.
4.
5.

Now you can start filling in your Work Breakdown Structure.

The first thing to consider is the order of the work packages. For our filing system example, you could start by developing a paper trail policy, and build your plan from there. But what happens if the resources you need to make the policy work aren't included in the final budget that's approved?

Likewise, if you purchase your cabinets and other items before you have secured a new space, how do you know everything will fit, and that the room is the most ergonomically designed?

**Tip:**

The Work Breakdown Structure (WBS) here is action oriented. This means breaking the project into different activities and tasks. You can also create achievement-oriented WBSs and function-oriented ones. To read about WBSs go to: [http://www.mindtools.com/community/pages/article/newPPM\\_91.php](http://www.mindtools.com/community/pages/article/newPPM_91.php)

project name at the top. Then, in the second layer, record the first three or four work packages in the order you think they should be completed. These will not be hard and fast as there will probably be some overlap, so just do the best you can. Here is the order for our filing system example:

- Secure permissions.
- Develop a policy.
- Purchase materials.
- Make the move.

Now you need to look at each of these work packages in detail. You may have identified specific actions in your brainstorming, however, there will be places where you need to fill in the detail.

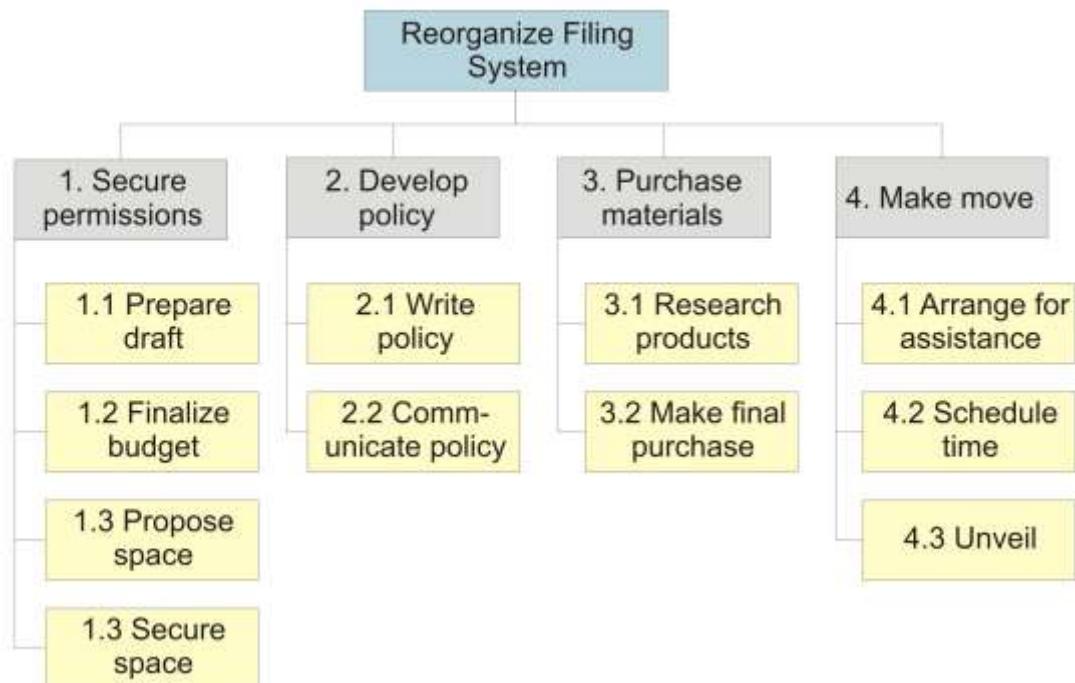
What specifically needs to be done in order to complete the corresponding work package? Make sure you also consider who needs to be doing it. Here again, consider what needs to be done first, second, third, and so on.

**Action:** Use the blank diagram on page 15 to create your Work Breakdown Structure. Write the

**Action:** For the work packages you've identified, fill in the third layer of the WBS.

Be careful to use enough detail so the process is meaningful and not so much detail that it becomes unusable. Our example is given below.

The final step is to figure out the exact order of tasks and create a project timeline. This is covered in the next section.



### 3. Gantt Charts

For very small projects, completing an Action Plan or a Work Breakdown Structure may be enough.

However, if your project involves scheduling tasks which are dependent on one-another; involves bringing different people in at different times; or, needs to be completed by a certain deadline, then you need more structure in order to keep all the elements of the project flowing smoothly. (Here, don't be lulled into thinking that you can keep all the time details in your head, or that a simple, ordered to do list will suffice!)

If you're going to plan you should do it right, and that means creating a Gantt Chart. It doesn't need to be fancy or created by a software program - for smallish projects, a paper and pencil Gantt Chart is just as effective. The important thing is that you have the ability to see at a glance what has been done, what needs to be done, and pinpoint critical junctions where completion of one or more activities relies on the successful completion of something else.

#### Step One: Establish Timeframes

To fill in your Gantt chart you need an estimate of the time it will take to complete the specific tasks you've listed in your WBS. Estimating time is not easy, and you should always build in plenty of extra room to allow for unexpected circumstances. Use your best judgment to start, and trust that you will get better at this as you get more experience.

**Action:** For each of the specific activities detailed on the WBS, make a note of the time you estimate you need for each. Record this in the bottom right corner of each activity box on the WBS.

#### Step Two: Chart the Times and Task Relationships

Now you need to pull the activities together and look at how they relate to each other in terms of completion. This is best done in table form.

**Action:** Use the worksheet on page 16 to start listing tasks and task relationships. In the first column list all the specific activities you need to complete.

Once you've done that, consider how each of these relate to the others. Fill in the rest of the chart as follows:

- Possible start - how long into the project will this task start? One day, three days, one week, two weeks, etc.
- Length - write down your time estimates here (minutes, hours, days).
- Type - is the activity sequential or parallel? A sequential task is generally one that is done before or after another is completed. A parallel activity is one that is done at the same time as another.
- Dependent on - here you record what other task has to be finished before (sequential tasks) or at the same time as (parallel tasks) the task you are working on.

The task list for our example filing system project is shown on the next page:

**Tip:**

For more on Gantt Charts, see

[http://www.mindtools.com/community/pages/article/newPPM\\_03.php](http://www.mindtools.com/community/pages/article/newPPM_03.php)

Task	Possible Start	Length	Type	Dependent on...
1. Prepare Draft Budget.	Immediate	1 day	Parallel	
2. Finalize Budget.	1 weeks	1 day	Sequential	1
3. Propose Space.	Immediate	1 day	Parallel	1
4. Secure Space.	1 weeks	1 day	Sequential	3
5. Write Policy.	Immediate	1.5 weeks	Sequential	2, 4
6. Communicate Policy.	5 weeks	1 day	Parallel	11
7. Research Products.	1 week	1 week	Sequential	2, 4, 5
8. Make Final Purchase.	3 weeks	1 day	Sequential	7
9. Arrange for Assistance.	3 weeks	1 day	Sequential	2, 4, 5
10. Schedule Move.	3 weeks	1 day	Sequential	9
11. Unveil.	5 weeks	1 day	Parallel	6
12. Conduct Move.	5 weeks	1 day	Sequential	11

### Step Three: Plot the Tasks on Graph Paper

A Gantt chart uses graph paper or spreadsheet cells to depict when the tasks will be completed over the course of the project. It shows where tasks overlap and clearly identifies tasks on the critical path.

**Action:** Using the grids on page 17, complete your own Gantt chart.

Make adjustments to it as you need to. You want to ensure the final result is a schedule you can live with and that will get you the results you need.

Our filing system example is given below:

Week 1	2	3	4	5
Draft budget				
Propose Space				
Finalize Budget				
Finalize Space				
Write policy				
Research product				
Final Purchase				
Arrange assistance				
Schedule move				
Unveil				
Move				

## 4. Key Learning Points

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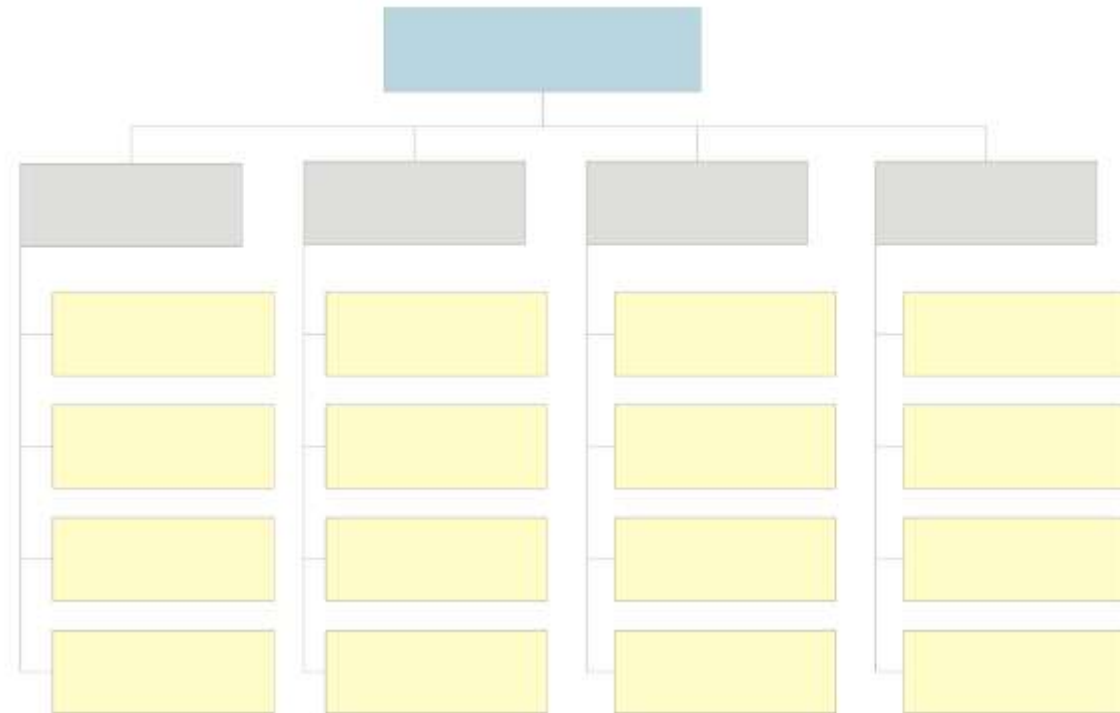
With a bit of up front planning you can execute your small projects very successfully, and you don't need to use all the fancy tools associated with traditional project management.

You do however, need to respect the planning process and create a realistic and organized schedule. By starting with a list of what needs to be done and working your way to the details you can develop a plan that outlines specific actions as well as timeframes for completion.

Don't make the mistake of thinking that anything but the smallest project can be effectively managed in your head. Put in the right amount of effort and you'll achieve up with a fabulous end result that you are proud to put your name to.



## Work Breakdown Structure



## Task List for Gantt Chart

Task	Possible Start	Length	Type	Dependent on...
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				

## Gantt Chart Grid (print this out)

A full-page sheet of white graph paper featuring a uniform grid of thin black horizontal and vertical lines. The grid consists of small squares covering the entire area of the page.