

# Planning and Estimating Tips from Wisereach

## Ten golden rules of project planning and estimating

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Having a solid, realistic plan in place for your project is critical, but many focus on getting a perfect plan at project startup without thinking about how the plan will live through the life of the project.

We have compiled these ten golden rules to help you get a practical plan in place and maintain it throughout your project as your key aid for getting the project delivered.

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| Don't go into too much detail                        | Planning is critical – but if you plan an IT project to too much detail you'll spend most of your time managing the plan instead of managing the project. You need to find the right level of plan that ensures you are on top of the project and your team understands what they have to do when.   |
| Communicate outside of the team with milestone plans | Don't use your detailed plan as a communication mechanism – it's full of irrelevant information for others. Far better to put together a one page milestone plan showing the key activities of relevance and any critical external dependencies. If you have many different stakeholders, you may want to consider producing different views of your project plan based on your stakeholders' area of interest.              |
| Make sure the whole team knows the right plan        | There's no point having a plan that you are working to that your team doesn't know. Plans do change, and when they do make sure you tell the whole team – even if the new plan is not completely finalised. It's often good to get into a regular planning cycle, so the team know when to expect an updated plan – even if sometimes there is minimal change to the plan.   |
| Get the team to build the detailed plan              | Your team are going to do the work, so why not get them to plan it? The trick is to build a master plan to enough detail for identifying discrete chunks or modules of work which can be passed to a team member for detailed planning and estimating. You'll not only spread the work out but you'll gain ownership of the plan from the team. If the team feel ownership for the plan, they're more likely to stick to it. |
| Use data from other projects                         | While your project may be unique, there are many components of your project that have been done before – both within the organisation you are working and elsewhere. Take advantage of past experience and feed this into your plan. This data isn't usually readily available, so talk to other project managers and find out areas they've planned before  |

– but don't forget to ask what actually happened!

Estimate effort using more than one method	Getting plans and estimates right is a difficult task and no one method is perfect. To avoid 'black holes' in your plan, make sure you use more than one method to estimate the work. If the two methods come up with completely different effort profiles, then you need to review your planning in more detail – there's probably something you've missed. Example methods include top-down estimating, Function Point Analysis, bottom-up estimating, module sizing and Use Case metrics.
Review your plan with a peer	Once you are reasonably confident with your plan, find a peer to review it with you. Walk through your plan and explain the process you've followed. The activity will help ensure you've not missed anything major and will give you the confidence your plan is achievable. If you're peer-reviewing someone else's plan, make sure you give them honest feedback – they'll do the same for you in return.
Make your plan easy to edit	If you're working on an IT project – there's one thing that's certain – your plan is going to change. Make it as easy as possible to baseline your plan and create a new version, these facilities exist in most planning tools, but it's just as important if you're using a simple planning mechanism in Excel or Powerpoint.
Ensure you include external dependencies	External dependencies are a major contributor to project slippage. Make sure you are on top of your external dependencies by including them clearly in your plan. You can do this with a special milestone type so they are visually obvious. Once they're in your plan, find an owner of the milestone and make sure they know of your dependency. Keep in regular contact with the milestone owner so you will know immediately if anything changes.
Focus your planning on achieving the project.	Many formal plans are put in place to satisfy a company standard or meet the requirements of a project office – don't get caught up in creating a plan for planning sake. If you don't think your working plan is helping, get the process changed – if it's not working for you, it's probably not working for others either.

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