

Pre-emptive Project Planning

A presentation by John Hedtke
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Speaker Background

John Hedtke has worked in high tech for 30 years and has written documentation and books for many leading software products. John owns and operates *JVH Communications*, a company that provides writing, consulting, and training services to private and government clients in all fields. A list of clients, projects, and other information can be found at his web site, www.hedtke.com.

When not otherwise occupied, John lives in Eugene, OR, where he writes magazine articles, plays the banjo, and sings Renaissance music with a small chamber choir. John is a Fellow of the STC and served on the STC's Board.



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What This Presentation Covers

- How to avoid crisis projects while being dazzling
- How to set up and use a simple tool to track existing projects
- How to gather information about projects that don't exist yet
- How to disseminate the information throughout the company for the best effect
- The long-term effects of pre-emptive project planning (including cultivating an aura of calm and quiet omniscience)

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The Problem Isn't the Existing Projects...

- You know what you have to do
- You know what needs to be managed
- You have a good idea of what phases need to get done and by when

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...It's the Projects You *Didn't* Know About

The *real* problem is the projects you don't know about that land on your desk suddenly and without warning.

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What You Can Do

Apart from smacking the beans out of people that do this to you, you can do a few things to prevent this happening in the future:

- Gather your own information
- Make plans in preparation
- Share your information with your peers
- Throw out your project tracking information

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What's Wrong with Project Tracking Software?

Project tracking software depends on clear, stated dependencies that do not change frequently.

Technical communications has multiple interconnected dependencies that can change daily, sometimes hourly.

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Simple Is Better

The best tool for tracking documentation projects is a spreadsheet.

Setting up a spreadsheet is easy.

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The Basic Planning Spreadsheet...

- You'll have a row for each project.
Columns should include:
- Project lead
 - Writer
 - Project Name
 - Project module/task
 - About a year's worth of week columns

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...Looks Like This

			Documentation Resource Planner														
			Week of April 23, 2004														
Lead	Writer	Project	5/14	5/21	5/28	6/4	6/11	6/18	6/25	7/2	7/9	7/16	7/23	7/30	8/6	8/13	8/20
Totals by week in hours			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Totals by week in resources			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

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Entering Current Project Info

- Make a line entry for each current project.
- Enter the estimated hours/week
 - Make the entries in chronological order by project start date
 - Include absolutely everything

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Planner with Current Projects

			Documentation and Graphics Resource Planner														
			Week of May 14, 2004														
Lead	Writer	Project	5/14	5/21	5/28	6/4	6/11	6/18	6/25	7/2	7/9	7/16	7/23	7/30	8/6	8/13	8/20
Kate	John	Graphics for web site	20	20	20												
Bill	Marilyn	"Mind's Eye" CD user guide	40	40	40												
Bill	John	Graphics localization procedures	5														
Kate	Linda B. (2003)	Editing "Mind's Eye" online help	80	80	80	40	40	40	32								
Kate	Dw. (2002)	Site installation document	80	80	80	80											
Bill	Clare	Info-Power user guide	40	40	40	40											
Bill	Clare (2003)	Fax Pro user guide	40	40	40	40											
Kate	Julia	Fax Pro online help files	40	40	40	40	40	32									
Bill	TPO	"Mind's Eye, Mark II" CD user guide	40	40	40	20	20										
Totals by week in hours			305	340	380	380	240	100	100	64	0	0	0	0	0	0	0
Totals by week in resources			7.6	8.5	9.5	9	6	2.5	2.5	1.6	0	0	0	0	0	0	0

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Cleaning Up Your Data

After the projects are set up, clean up your data.

- Adjust for due dates
- Budget for holidays
- Budget for vacations
- Add a CYA notice

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Cleaned-up Planner

Documentation and Graphics Resource Planner
Week of May 14, 2004

Lead	Writer	Project	5/14	5/21	5/28	6/4	6/11	6/18	6/25	7/2	7/9	7/16	7/23	7/30	8/6	8/13	8/20
Kate	John	Graphics for web site	20	20	20												
Bill	Marilyn	"Mind's Eye" CD user guide	40	40	40												
Bill	John	Graphics localization procedures	5														
Kate	Linda E. (cncr)	Editing "Mind's Eye" online help	80	80	80	80	40	40	40	32							
Kate	Cheryl (cncr)	Site installation document	80	80	80	80											
Bill	Clare	Info-Power user guide	40	40	40	40											
Bill	Clare (cncr)	Fax Pro user guide	40	40	40	40											
Kate	Jack	IFax Pro online help files	40	40	40	40	40	40	32								
Bill	TEO	"Mind's Eye, Mark II" CD user guide	40	40	40	20	20										

Totals by week in hours: 305 340 350 360 240 100 100 64 0 0 0 0 0 0 0 0 0 0 0
Totals by week in resources: 7.6 8.5 9.5 9 6 2.5 2.5 1.6 0 0 0 0 0 0 0 0 0 0 0

The information presented here is for estimating purposes only. Schedule dates are based on the most current information, but should be considered "best guess" estimates for purposes of resource planning. This information is company confidential.

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Adding Projects That Aren't There

Reasons a project isn't real yet might include:

- It's the scheduled next version of the company's bread-and-butter product
- The project budget hasn't been approved by the company's executive committee
- Turf wars
- A salesperson is about to close a big deal and there will be customization involved
- Bad planning and communication on management's part

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Initial Information Gathering

- Poll your team members for information about unscheduled or unapproved projects
- Enter the unapproved projects in a separate section of the planner labeled "Unscheduled/Unapproved Projects"
- Add estimated hours if you like
- Again, add all the detail you can

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Unscheduled Projects Added to Planner

Documentation and Graphics Resource Planner
Week of May 14, 2004

Lead	Writer	Project	5/14	5/21	5/28	6/4	6/11	6/18	6/25	7/2	7/9	7/16	7/23	7/30	8/6	8/13	8/20
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Kate	Jack	IFax Pro online help files	40	40	40	40	40	40	32								
Bill	TEO	"Mind's Eye, Mark II" CD user guide	40	40	40	20	20										
Bill	John	Company Newsletter															
Bill	TEO	FaxPro v2.0 user guide															
Jim	TEO	Fax sheets for Tech Support															
Jim	TEO	Info-Power localization															
John	TEO	Process flow documents (internal)															

Totals by week in hours: 305 340 350 360 240 100 100 64 0 0 0 0 0 0 0 0 0 0 0
Totals by week in resources: 7.6 8.5 9.5 9 6 2.5 2.5 1.6 0 0 0 0 0 0 0 0 0 0 0

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Distributing the Planner

Distribute copies of the planner to:

- Everyone in your team or department
- Everyone above you up to the top levels of the company
- Every department/senior manager *except* Sales
- Anyone else who looks like they need the information

Distribute on Friday for the upcoming week.

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Maintaining the Planner

Schedule a weekly meeting. Each team member should check the items assigned to them on the planner and provide updates to their schedule and information about the project status, such as engineering slips, personnel changes, and so on.

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The Fun Part

- Everyone's going to be a ➤spy◀
- Have everyone ask gather as much information as they can
- Rumor, gossip, and innuendo can be your most valuable sources of information
- Again, list everything on the planner

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Your Job, Should You Decide to Accept It...

As a leader, you need to be a spy, too

- Talk to everyone at all levels
- Ask probing questions
- Don't believe the official pronouncements from a VP; check them out with the folks in the trenches

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Keeping Things Going

- Update the planner with the information you've gathered during the week
- Distribute the planner at the same time each week
- You're going to be a channel for news
- Remove unscheduled projects only when they're really dead, not just when someone says they're dead

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Things You Can Enhance

- Add more total lines: actual available resources, actual vs. estimated, subtotals for approved vs. unapproved
- Automate the holidays on the planner with the WORKDAY function
- Include a table of projects that have ended, are about to start, new writers coming in, other notable occurrences that week

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What's In It For You?

- You can show where and when you need to hire additional writers and other resources
- You have long-term visibility of the upcoming resource requirements
- Your writers have long-term visibility of the upcoming resource requirements

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The Long-Term Advantages

- Sets a company standard for planning
- You can make more accurate long-term plans
- You look cool
- You get more respect
- You don't have to work late nights and weekends fighting someone else's fire

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Recommended reading

- *The Secrets of Consulting* by Gerald M. Weinberg
- *Peopleware* by Tom DeMarco & Timothy Lister
- *A Whack on the Side of the Head* by Dr. Roger von Oech
- *Clutter's Last Stand* by Don Aslett
- *The Richest Man in Babylon* by George S. Clason
- *The Time Trap* by Alex Mackenzie

(This list is at <http://www.hedtke.com/clouds.htm>)

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Resources

- Go to <http://www.hedtke.com/clouds.htm> for the recommended reading list, links to the handouts, and other resources, including links to free classes to increase your skills.

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Thank you!

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Feel free to email or write if you have questions.
(Please use the name of this seminar as the subject so I can get to it quickly.)



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