

## APPENDIX B. PROJECT LEADER'S NOTEBOOK

This Appendix describes a method for keeping up-to-date key information readily at hand as shown in Figure B-1.

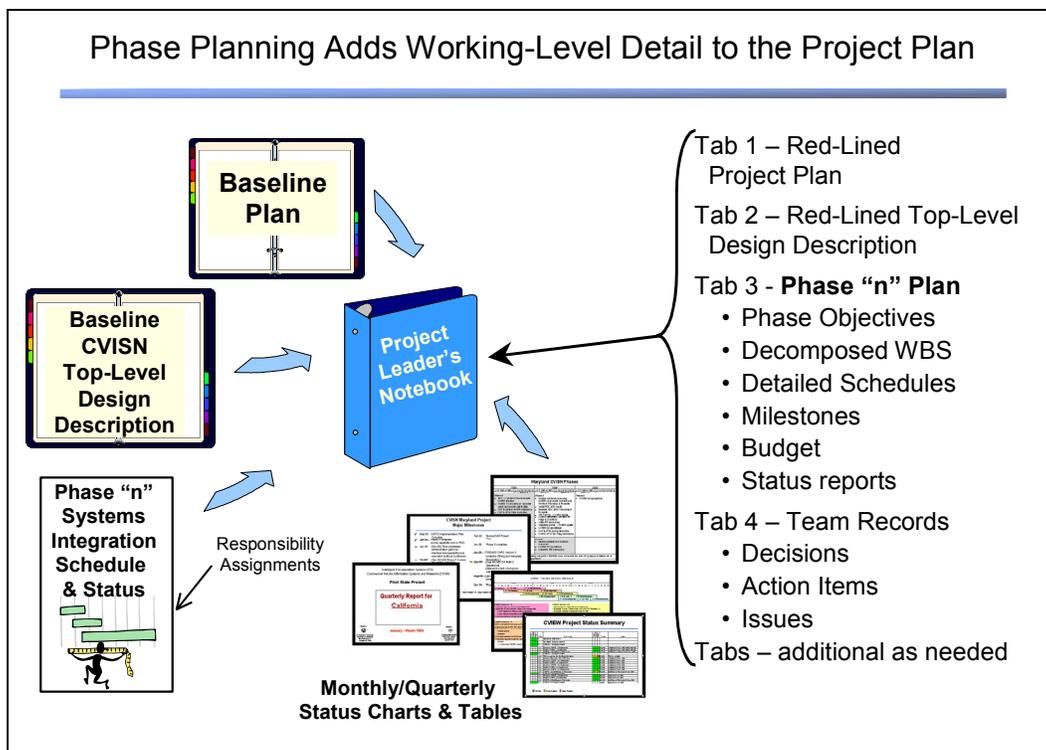
### B.1 Tab 1 – Red-Lined Project Plan

Some key pages of the published Project Plan are handy to have close by, such as the latest:

- Project Organization Chart
- Contact list (names and telephone numbers)

The rule of thumb is to keep up-to-date those items that people ask for.

Make red-line changes to assist you if and when you need to formally republish the Project Plan, but don't feel constrained by the "need" to republish it periodically.



**Figure B-1. Project Leader's Notebook Keeps Up-to-Date Phase Plan Readily at Hand**

## **B.2 Tab 2 – Red-Lined Top-Level Design Description**

As the development proceeds, requirements evolve; computers with expanded capability become available; new versions of commercial off the shelf (COTS) products (e.g., operating systems, databases, spreadsheets, browsers) are released; and end-users gain experience working with your prior deployments. All of these might be grounds to update the baselined top-level requirements and design. Manage such changes using your configuration management processes. Keep the design red-lined so that you have ready access to current drawings, tables, checklists, etc.

## **B.3 Tab 3 – Phase Plan**

Visualize the Phase Plan as a suite of readily-useful key planning and tracking charts as opposed to a wordy bound document. Imagine a mountain climber – his or her base camp is equivalent to our Project Plan, but their backpack is equivalent to our Phase Plan. Weight counts; so carry only the necessary tools: the phase planning gear necessary to tackle the work immediately ahead.

Figure B-1 illustrates the essential elements of the Phase Plan, packaged into the Project Leader's Notebook. The Project Leader can write some of the elements, but others must come from the individual development team leaders.

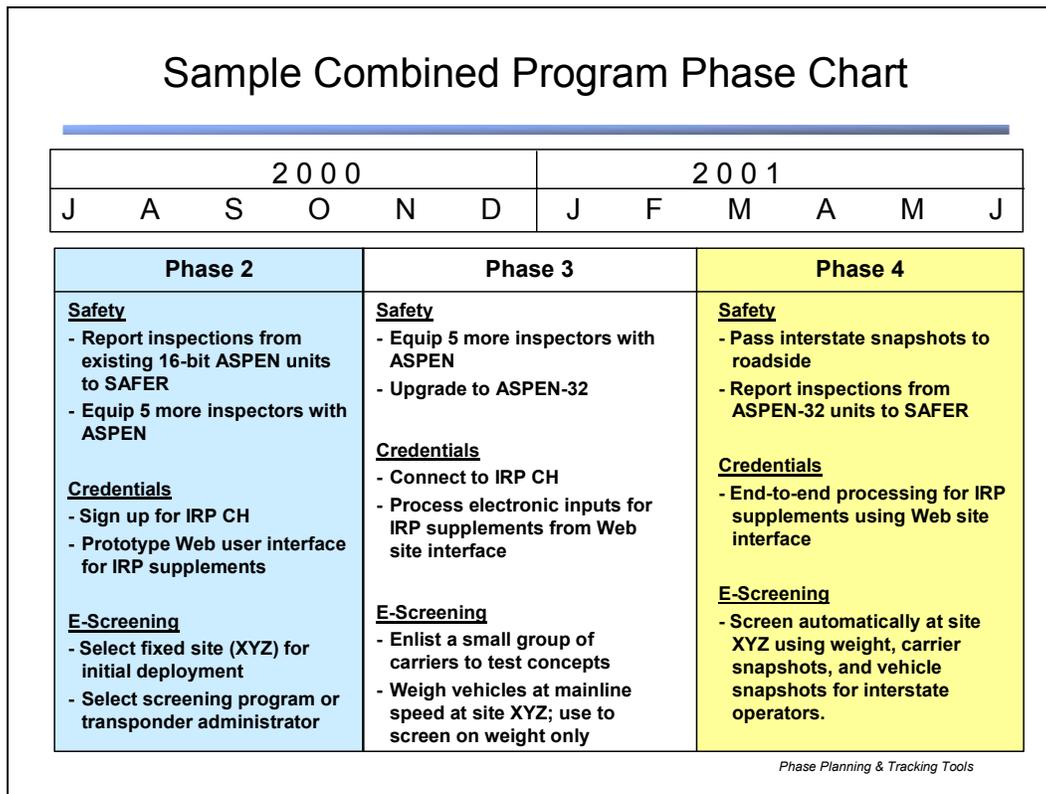
If there are issues that cannot be decided while preparing the Phase Plan, simply document them as such and move on. Do not lose the issues, but do not get bogged down.

### **B.3.1. Phase Objectives**

The objectives for each phase should be clearly stated so that all stakeholders can understand them. Often these are simply a bulleted list of target capabilities such as that shown in Figure B-2, which is an example of a program-level phase chart. A project-level or product-level phase chart would summarize the target capabilities planned for just one project or product in the upcoming phases.

### **B.3.2. Decomposed WBS, with Tasks Assigned**

When you completed your Program or Project Plan, you developed the upper levels of the work breakdown structure (WBS). The details portrayed in the lower levels of the WBS have been evolving as the program/projects proceeds. Update the WBS to fill in the missing detail for the work to be done as you come to understand it.



**Figure B-2. Update the Phase Charts as Part of Detailed Scheduling**

### B.3.3. Detailed Schedule

The detailed schedule evolves from the target capabilities portrayed in the phase charts. The schedule should show the start and stop dates for the design, development, test, procurement, and integration activities related to accomplishing and demonstrating the phase objectives. Add external dependency tasks as needed.

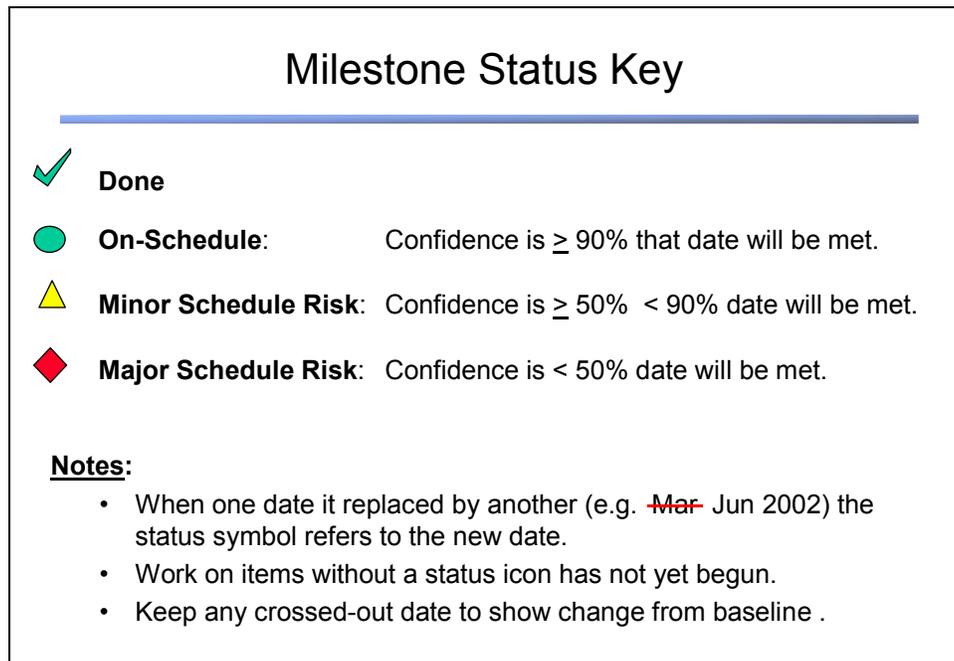
**There is no substitute for a detailed working-level schedule.** How detailed? Down to about one person working for 2-4 weeks. At this point the team leader can assign real people to real tasks and get real work done, and at the same time can easily see if they are meeting the overall plan. Working-level schedules are “owned” by the development team leaders, which means they create and maintain them not merely as reporting vehicles but as tools that help get the job done.

The link to the phase charts is the vertical traceability downward of programmatic milestones (such as the end of a phase) and upward of strategic and visibility milestones.

### B.3.4. Milestones

Milestones are expressed in a list using a planned date and a statement of the target accomplishment. As a phase proceeds, it's useful to indicate progress by showing the latest estimated completion date, and a measurement of how likely it is that the new date will be met. Don't eliminate the original planned date; then you can use the planned versus actual experience to do a better job of planning the next time.

Identify strategic and visibility milestones from each development team's detailed schedules. Strategic milestones are those that impact another development team or the end user, such as release of a new version of a software product. Visibility milestones are those that indicate tangible interim progress, such as release of a draft design document. Then consider how all the products will come together to be integrated, tested, and released for production use. Don't forget support tasks staffed by non-project team members (for example, operational staff conducting acceptance tests).



**Figure B-3. Milestone Red-Yellow-Green Key**

### B.3.5. Budget

Budget plans are usually expressed as planned labor hours per unit time (often per month), and planned travel costs, material costs, subcontract costs, and other direct costs. The cost breakdown elements you plan and track will be dictated by your accounting system. You should also keep in mind what the funding sources expect in terms of accountability. The Phase Plan should indicate funds on hand and how they are expected to be spent over time.

### B.3.6. Status Reports

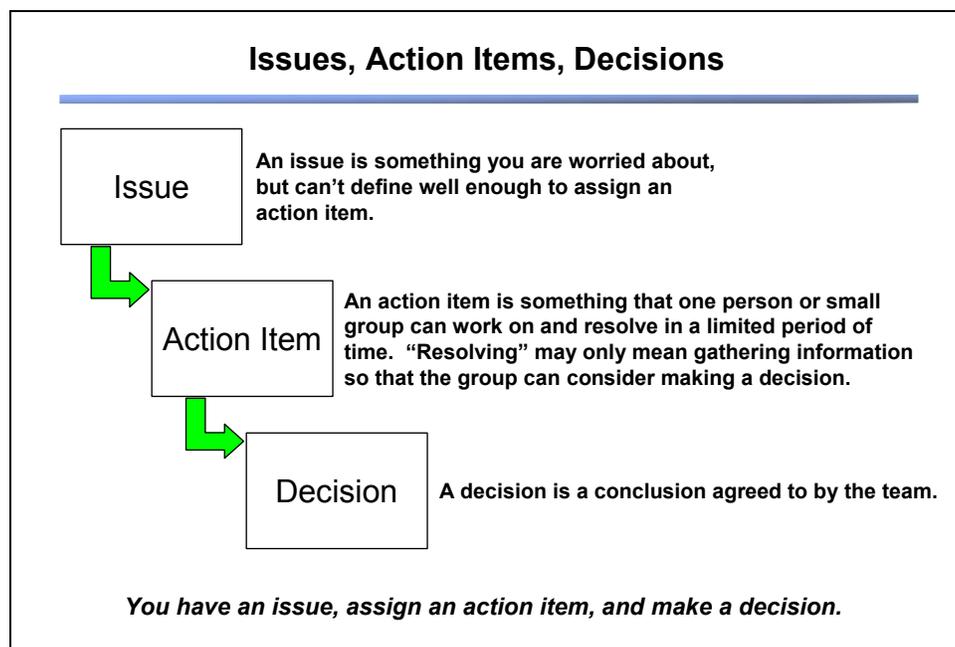
A good test for what belongs in the Phase Plan is whether the charts and tables are in a format useful for presentation at monthly internal status meetings or quarterly external status meetings. An example would be a software version delivery schedule. As a result of being updated for these meetings, the Phase Plan itself is simultaneously kept up to date without additional effort.

In the words of one project manager, “the Phase Plan should be so useful that you actually feel like keeping it up to date.”

Examples of status charts are given in Appendices C and D. They can be conveniently 3-hole punched and placed in the Project Leader’s Notebook so you’re prepared for an on-the-spot briefing. Note that large arrows are used to call attention to key points during an oral presentation.

## B.4 Tab 4 – Issues, Action Items, Decisions

Continue to maintain the running list of issues, action items, and decisions. It might be useful to categorize the open items regarding which should be settled in the current phase, and which can be postponed. Figure B-3 shows how initially-vague concerns can eventually be settled as more information becomes available and people can work on them.



**Figure B-4. Key Categories for Capturing Programmatic Information**

## B.5 Other Information

It may go without saying but we'll say it anyway: keep conveniently at hand an up-to-date copy of any planning and tracking elements that you truly find useful. Conversely, ignore what you don't find useful.

## B.6 Do I Have Any Flexibility?!

The complexity and length of a Phase Plan will vary with the circumstances of the CVISN program in your state.

Overemphasis on documentation is not the answer, and can detract from developing a truly useful Phase Plan. You will have to work hard to find the right balance point for the team between “planning” and what they [unfortunately] perceive as the opposite of planning, “working”.