

# Don't forget the soft-side of project planning

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*Project planning in New Product Development (NPD) is particularly challenging because there are so many variables. Many organizations have introduced some discipline in NPD project planning. But a lot of this discipline has been focused on the hard side of project planning: schedules, dates, etc. Gene Kania reminds us that the real power in NPD planning and execution lies in paying close attention to the soft-side of project planning and shares his insights on how to do that.*

Let's face it: meaningful project planning is hard work. At the same time it appears unrewarding. After all, when we are planning, we are just talking about how we are going to do something; we are not actually, doing it. Our cultural preference for *doing* often gets in the way of any meaningful planning. Unfortunately, this situation is common in many NPD organizations today where the pressure to *do, do, do* overwhelms the need to *plan, plan plan*. Nevertheless, many NPD organizations require project plans such as the one shown in Exhibit 1 on this page. And most project teams respond by focusing on what is called the "hard-side" of project planning. This is a mistake.

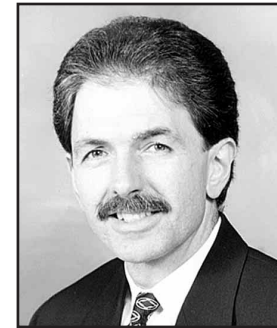
In general, the hard side of project planning refers to when the project team prepares a schedule of the project activities and attempts to meet the project due date requested by management. The team has a strong sense of what needs to get done and sometimes has formalized that into a work breakdown structure (WBS). Some teams think through how the pieces will be fit together into a product—often called integration planning. The outcome is a schedule that usually dominated by a series of intermediate due dates or milestones.

### The process itself

Another characteristic of the hard-side of project planning is the type of process used for it which is most often focused on "efficiency" not "effectiveness". Typically, the project manager

gets together with a couple of the technical managers to sketch out the "integration plan" spelling out how different elements of the project will fit together into a final product. This framework is pushed out to the various functional areas involved in the project for them to clarify or add their individual contribution to the project.

This is very "efficient". Long meetings with large numbers of project team members are minimized, if not eliminated. It is also "efficient" in that individuals can provide their contribution "off-line." However, the problem is that the underlying assumptions that went into shaping the framework are rarely surfaced and almost never challenged in such a process. Why? Because people are acting as individual



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and credible. If there was any, earlier team buy-in, it is usually lost at this point.

### The soft-side of project planning

The "soft-side" of project planning is different. First and foremost, it recognizes that NPD is a team sport. While the hard-side of project planning focuses on schedule and dates, the soft-side of project planning focuses on team-building through obtaining buy-in around a shared goal.

The first step in the soft-side of project planning is to assemble a "core project team." These individuals should represent the major functional areas that will contribute effort to the project. This core team begins by seeking clarity for the goals of the project and alignment of the team around those goals.

Secondly, the "core project team" must focus on identifying and logically sequencing the deliverables that are required to achieve the project goals. An example of such a simple project plan is shown in Exhibit 1 on this page. The tasks spell out the deliverables and the arrows define the logical sequence. With this method, the focal point becomes the "handoffs" between the different functional areas (i.e. the arrows between the tasks). It is these handoffs that are crucial to the success of the project.

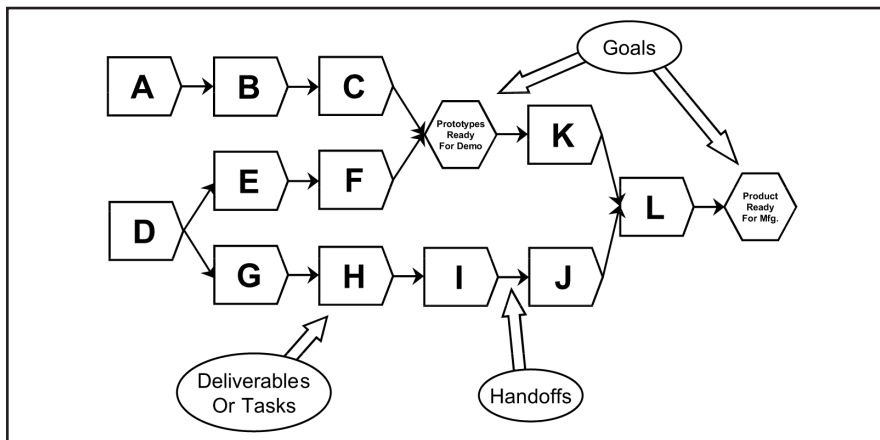
This activity is best accomplished in a team planning session led by a trained or experienced facilitator. This is usually someone outside the project, but in some cases may be someone outside the development organization, even an outside consultant.

Once the basic plan of tasks or "deliverables" and dependencies or "handoffs" is defined and agreed upon by the core project team, then the core team members are charged with taking the plan back to their functional areas for sev-

“ The soft-side of project planning focuses on team-building. ”

contributors to the plan rather than being part of a team. There is no formal forum for understanding and/or challenging the underlying assumptions. The "off-line" input of each individual is simply rolled up into the overall project plan. The lack of "effectiveness" of this approach usually becomes evident when the resulting schedule cannot meet its due date. Teams are "forced" to come together at that point to "crash" the schedule which very often results in schedules that are even less realis-

Exhibit 1: "Goal, Deliverable and Handoff" Project Plan



eral reasons. First, they must scrutinize the plan with the functional team to make sure that all the assumptions in the plan so far are valid. This is a key step since it helps achieve buy-in of the plan beyond the core project team, and in most cases, at the individual contributor level. Second, functional teams can clarify the deliverables for their tasks. This allows them to do a credible job with the third task which is to assign resources and duration times to the tasks. With this information, the project manager is able to finalize the hard-side of project planning by finalizing the schedule and dates.

The essence of the soft-side of project planning is shown in the box on this page. The benefits to organizations that engage in the soft-side of project planning are significant. First, we have built a team that has rallied around a shared goal. Second, we have gained the buy-in of not just a few people, but of an entire core team that has extended its reach out to the functional areas that contribute to the project. Third, there is energy around the plan.

How can you tell if you got the benefits of the soft-side of project planning? Watch what happens to the plan once project execution begins! "Schedule and date" (hard-side) plans often get ignored or filed away. But, "goal, deliverable and handoff" (soft-side) plans become a real road map for project execution. Teams rely on them to make sure they are on course. If a detour is required, they can anticipate when they will be back on the main road rather than driving in the dark. The plan becomes a living document that keeps the team focused and keeps management informed as to issues and progress.

**Good project execution**

The value of good project planning is that it leads to good project execution. When the hard-side of project planning is over-emphasized and/or when the soft-side of project planning is ignored, "schedule and date" plans are often reduced to a series of milestone dates for which individual functional areas, reluctantly, take responsibility.. There is no sense of shared responsibility. The sense of connectivity in a project between

**The soft-side of project planning**

- Immersion of the core project team in a series of team planning sessions to develop a meaningful project plan, not just schedules and dates, but goals, deliverables and handoffs; and
- Engagement of the functional teams to get their input *and* their buy-in.

different functional areas is lost and the effect is actually detrimental to the idea of forming a cohesive, functional project team.

On the other hand, when the soft-side of project planning is emphasized, not only do teams coalesce around a solid "goal, deliverable and handoff" plan for which there is broad buy-in, but project execution improves significantly as well. The communication infrastructure that was built during planning is intact for execution. It's easier for people

to talk or meet, because they've been doing it all along. Everyone understands and is more aware of the handoffs that must occur for good project execution. As assumptions change or other changes to the project occur during execution, the team is readily able to make adjustments that keep the project on track. Rather than point fingers at others, they are able to focus on issues as a team with the shared responsibility to put the success of the project first, rather than save face in their functional areas.

The investment required for project planning that emphasizes the soft-side is time and effort. Planning needs to become an event, not just a chore that needs to get done. The event takes time. But, the return on investment is significant. Anecdotal evidence suggests that investing in a few weeks of planning up-front can yield savings of many months during project execution. It is also the case that, as an organization continues to emphasize the soft-side of project planning; the organizational environment will begin to change. Planning a project gains importance, with an emphasis on team-building and buy-in. Execution is transformed from an individual, milestone approach to one of cooperation and shared responsibility. All these factors lead to a more effective organization that increases its speed, customer satisfaction and overall capacity to manage and execute projects successfully. ♠

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