PMC-TOOLS · EXERCISE · ACTIVITY PLAN

Creative structuring

Step-by-step plan for building an activity plan together

How an activity plan is created is very important for the success of the project – when made together with the team, creating an activity plan contributes a great deal to the team's commitment. Moreover, team members are very likely to have a much better idea of the activities in their own areas of work than the project manager. The technique used to build an activity plan together is called *creative structuring*.

There is often already an outline schedule: the project manager has already thought about the project and included some of the activities in the plan of approach. Even then it is important that the team itself still thinks carefully about how exactly the activity plan is filled in, and takes ownership of the plan.

PURPOSE	Building an activity plan together. This contributes to the team's commitment and makes use of the knowledge team members have of the activities in their own area of work.
WHEN	When making the activity plan, once there is agreement on what you will deliver in the project definition. For example in a Project Startup or a project fresh-up.
WITH WHOM	The project team members and the project manager, guided by a facilitator.
WHAT YOU NEED	A wall with four or five flip chart sheets side by side (slightly overlapping), and plenty of sticky notes and thick markers for all participants.

HOW TO GO ABOUT IT

Preparation

Check whether the project definition still raises any questions. Is the project result defined sharply enough? If not, spend some more time on that.

The steps

1. **Writing activities.** Ask the project team members to write down on sticky notes all the activities they can think of, individually and in silence. Note one single activity on each sticky note using a marker. The aim is to collect all the relevant activities that need to be executed and planned.

   Tip: activities contain a noun and a verb. So not only the word 'report', but 'write report', 'edit report', 'lay out report'.

2. **Pinning up and forming rough clusters.** This is the most important step, and for you as facilitator the most work. Discuss each sticky note and pin it on the wall covered with flip chart sheets. Make sure that the activities are explained and discussed one by one by the people who wrote them, and only then pinned up. For each activity, decide together whether it belongs in the project or in its scope demarcation (on a separate flip chart sheet!). Make sure all team members understand what is on the sticky note. When unclear, add text or rewrite the note. In this way you create a common language in the team. Pin related sticky notes together. Rough clusters will then emerge naturally.

   How you work as facilitator: take a sticky note and read out what it says. Facilitate the team in answering two questions. Is the content of the activity clear? If not, have the person who wrote it explain it. Does the team want to include it in the plan? If so, pin the note in a cluster; if you are unsure which cluster, ask the team. If not, pin it on the scope demarcation sheet.

Tip: take turns: ask the participants one at a time to explain one or two activities. This prevents one participant from stealing everyone else's thunder.

Tip: while pinning up the notes, do not discuss the order of the activities yet. That is a planning question – and will therefore be addressed later.

Tip: give activities related to managing the project (working out the schedule, meeting the sponsor, writing reports) their own place in the activity plan, in a cluster called 'Project management' (at the bottom of the flip chart sheets).

Tip: never pin roughly identical sticky notes on top of each other. Facilitate the team in choosing one shared wording.

Tip: once the clusters are clear, you can speed up: take all the sticky notes of one cluster (or as many as you are comfortable with) and work through them one after the other with the two questions. This keeps the team focused on one subject, which is quicker.

3. **Naming the clusters.** When all sticky notes with activities are on the board and arranged in rough clusters, arrange the clusters a bit more neatly and precisely and give each cluster a suitable name. Usually, cluster names are subdeliverables, project phases, areas of expertise, regions et cetera. Write the name on a sticky note of a different colour and stick it next to the cluster.

   Tip: this step can easily be executed by the project manager and one of the team members – as long as they do not rebuild the entire clustering. Afterwards, they update the team on the clustering.

4. **From activity plan to task division.** Ask all team members to write their name or initials with a felt-tip pen on the activities they are willing to take responsibility for. In this way, all tasks are taken on by the team members, based on their own choice. Less popular activities are left untouched; discuss with the team how to solve this.

5. **Planning the activities.** Once the tasks have been adopted, the activities can be planned. Work in small groups of no more than 2 or 3 team members. Ask them to take their own sticky notes off the board and place them in the correct order. Add any missing activities. Move the cluster names to the left side of the board and stick the activities back on the board along the timeline, creating a bar chart. This way, team members can take their own availability into account.

6. **Determining milestones.** Once the clusters have been placed on the timeline, the team checks for dependencies; move tasks around if necessary until they are properly aligned. Next, milestones and important meetings with the team and with the sponsor can be identified. Put these on the timeline as well, so that you can schedule them in good time.

Review and next steps

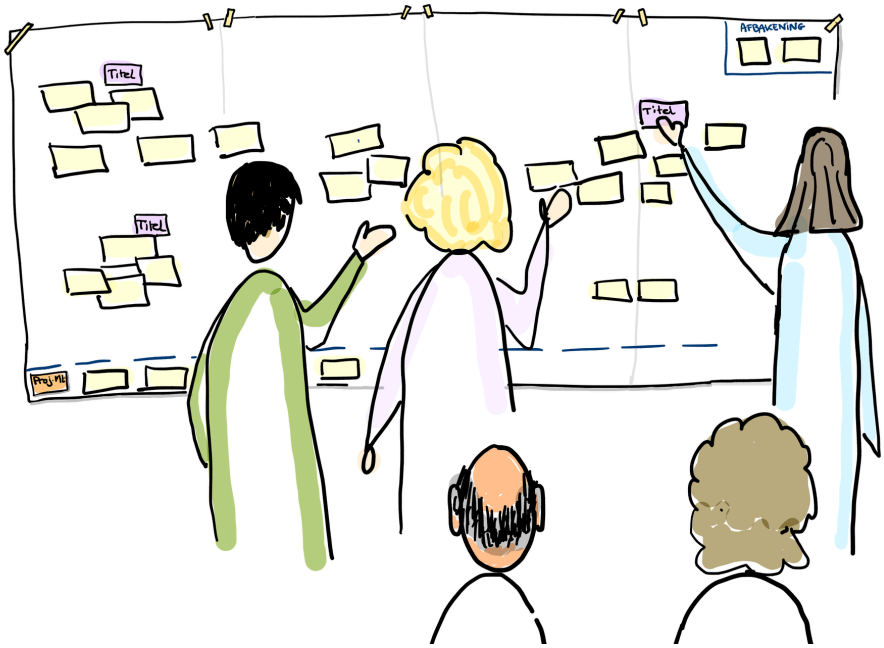
Everything is up on the wall now. Time for a moment of reflection: what do the team members think of the result? How does it feel? It may still raise questions or concerns, but it is also good to take a moment to celebrate that the team has reached an important milestone. Give the team a compliment for this; they can be proud of it.

Finally, make agreements about working out the plan:

- Who will record it, and in what kind of document or template?
- What does the project manager still need from the team members to complete the plan? A common agreement is that the team members estimate how many hours they need for their own tasks.
- When will you meet again, and what will be on the agenda? A risk analysis, for example, is a common next step.

TIPS

- This technique works best when the team focuses on the coming period. Our experience is that most teams cannot plan much further ahead than 6 to 9 months.



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