

# Addressing Common Project Management Scenarios in LiquidPlanner



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## SUMMARY

In traditional project management tools, you often need to use what-if analysis to figure out how different scenarios could impact your project in the future. With a Dynamic Project Management solution like LiquidPlanner, the tool automatically predicts outcomes involving timelines and budgets so you don't have to conduct the same type of analysis. Read on to learn how LiquidPlanner deals with common planning scenarios.

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## The Dynamic Project Management Methodology

LiquidPlanner is based on the Dynamic Project Management (DPM) methodology. The philosophy behind DPM is that projects are living, evolving constructs. This philosophy helps teams plan and schedule projects that map to the real world.

**Responsive system:**

Combines a fluid process, adaptive methodology and a predictive, automated tool.

Dynamic Project Management is a responsive system for managing projects that helps teams deal with uncertainty and respond quickly to real world changes in priorities and resources.

**Deal with uncertainty:** The project timeline accounts for uncertainty; work is estimated in ranges to show best case and worst case scenarios.

**Respond quickly:**

Realtime project data is always accessible and risks are presented early; make informed decisions at a moment's notice.

**Changes in priorities and resources:**

Teams collaborate in a common platform with clear priorities; the project schedule automatically updates when resource availability or priorities change.

Adopting the DPM system helps teams work on the right priorities at the right time. This approach also drives increased productivity, engagement and quality of work. It helps teams see and mitigate risks much earlier than they would with a legacy project management tool.

DPM software provides a platform that helps organizations scale growth and do innovative work. Let's see how.

## LiquidPlanner: THE Dynamic Project Management Tool

For starters, DPM tools are where teams actually work, not simply something to update as an afterthought or as a painstaking duty. And as priorities change, and team members make updates, the schedule changes accordingly, updating status, progress and top priority work. All of this occurs because everyone is using the same tool to organize tasks, and everyone is responsible for updating their portion of the work.

Here are some ways LiquidPlanner puts DPM into motion:

### **Priority-based Predictive Schedules**

With LiquidPlanner, you start the project planning process by focusing on priorities and people as opposed to tasks and dates. As your team prioritizes work, you get a realistic picture of when the project will get done. Then, as priorities change, you can easily shift items around and instantly see the impact of these changes make on your business.

Using your team's inputs, LiquidPlanner's algorithm calculates expected finish dates for projects and tasks. If dates don't meet your deadlines, you can adjust priorities, reduce scope, add, or assign new resources. There are tools in the system to help make those decisions.

### **Ranged Estimates**

In LiquidPlanner, the people doing the work add ranged estimates based on best case/worst case scenarios for how long it will take to complete their tasks. These dual-point estimates allow you to account for uncertainty across the entire project. This means that your plan is more realistic since it is based on data from the people who have the best understanding of current status, as opposed to wishes, hopes, and unrealistic deadlines.

### **Resource-based Planning**

LiquidPlanner not only shows you where all your resources are allocated, but also lets you shift work and resources to resolve issues. No surprises, no disasters. With LiquidPlanner, you have far more insight into your plan, resource availability, and project status than ever before. Your team will be focused on the right work because organizational priorities are built into the structure, and task priorities drive the schedule. Project timelines turn red when deadlines are in jeopardy. Alerts in the system show you where problems lie, so you can take action before it's too late. LiquidPlanner gets you out of fire-fighting mode. You are free to plan and think ahead.

Let's now examine some common planning scenarios in LiquidPlanner.

## **Scenario One: Scope Creep**

You've built out the perfect project and accounted for as much uncertainty as you possibly can. But wait, there's more! Stakeholders have something new in mind, sending the project in another direction. Or, the quality assurance team discovered an issue in testing that absolutely must be addressed before going to market.

Because your plan in LiquidPlanner is in real-time, you won't be running around to find out the latest status. Instead, you can act quickly to implement change and get the word out.

Find tasks that will take longer and update their estimates to reflect increased scope. Then, take a look at the new expected finish dates that are automatically calculated. Or, when scope creep involves a new deliverable altogether, add necessary tasks, estimate effort, and assign the best resources available to get the job done. When updating existing tasks or assigning new ones, affected members will be notified.

*Best Practice.* Be sure to document changes in the workspace so everyone is up to speed-- adding a comment to relevant tasks is a great way to do this. Before changing priorities, examine the critical path to see what might be impacted, then talk to the people involved. Communication is key. Work with your team to decide what can be shifted around comfortably, and when it can't, run it up the flagpole to get key decision makers involved.

ACTIVE PROJECTS	[ 898h - 1021h ]	
+ Gamespace Pro II Launch <small>for GameCenter Inc.</small>	[ 101h - 127h ]	
+ Testimonial Video	[ 39.23h - 50.27h ]	
+ InfoHub Integration	[ 84.2h - 107h ]	
+ Website Design <small>for Gravity Games LTD</small>	[ 66.06h - 82.04h ]	
+ TechPro Security Enhancements <small>for A-Tek Corp</small>	[ 31.61h - 53.69h ]	
+ Data Center Upgrade <small>for GFX Internal</small>	[ 195h - 231h ]	

## Scenario Two: Uh-oh, this is taking longer than expected

Closely related to scope creep, this scenario is internal. You've been diligently working on a task, and despite your best effort, it will take more time than you initially thought. It may be that work is brand new, and so it was never estimated before. It could also happen if a less experienced team member takes on a task, or you've hired a new employee who's still getting comfortable with your workflow. Whatever the reason, when things take longer, project delivery dates get pushed out.

In LiquidPlanner, it's easy to identify and communicate risk early and make adjustments before missing a deadline. Usually, it's enough to comment on a task when re-estimating. For more granular tracking, tag the task or set a custom task field to indicate that it was re-estimated. Monitor these with a dashboard widget filtered to the tag (or custom field). Use a LiquidPlanner Playbook to outline expectations for communicating and updating changes that affect the schedule.

*Best Practice.* Use project templates to mitigate this scenario. Review template estimates when kicking off a project and make adjustments where needed. After new initiatives run their course, use what you learned to create a template for next time. Periodically updating templates based on past experience will provide a more accurate schedule over time.

## Scenario Three: Can we take on more work?

Sales is hot right now, closing lots of deals - and you want to make sure your team can deliver. You need answers to these important questions: 1) When can we get the new project done? 2) What impact will that have on the existing portfolio?

When project templates are in place, you already have a pretty good idea how long it will take and steps required to execute the work. Because your active projects are positioned by organizational importance or even deadline, you also have a sense for what can be bumped and what absolutely can't be touched. Duplicate the project template and give it a name that identifies it as a planning placeholder. Then, prioritize the project in the plan based on what you know from looking the Projects tab and assign tasks.

Dropping a new project into your portfolio that is estimated and has potential task assignments will provide answers you need within seconds. If taking on this new project causes even one of your strategic projects to be at risk, you'll have the ammunition to push back and a strong foothold for negotiating and resetting expectations.

*Best Practice.* Leverage your LiquidPlanner Playbook (team guidelines) by setting up systems ahead of time so when you're taking the steps outlined above, the rest of the team can roll with it. When you assign work, the prospective project team will be notified. Using a naming convention that indicates no action is required lets them focus on immediate, existing priorities while you figure out the details. Analytics Resource reports, or the Resource Workload report on the People tab can help you see who can take on more work, and when they're available.

Filter: IT Team Next 30 days

NAME	Wed 09/28	Wed 10/05	Wed 10/12	Wed 10/19	Hours Available
IT Team					469.34h
Adam					33.21h
Josh					67.89h
DaleP					70.32h
AlisonM					141.21h
Tatyana					156.71h

## Scenario Four: Project Remodeling

Let's face it, even the best-laid plans go awry and leave you calling for a do-over. Want to see what happens if work is assigned to someone else? Need to break down a larger task to better manage priorities? Is there a change in scope or detail? When staring down one, or all of those possibilities, it's time to test out new scenarios.

Begin by giving the project team a heads up. Then, duplicate the project and put it on hold. Rework the copy of the project until you settle on a new plan. Editing an exact copy allows you to test scenarios to your heart's content without actually changing the live project until you're ready. At that point, update the original project to match, take it off hold, and delete the copy. Send out an all clear message.

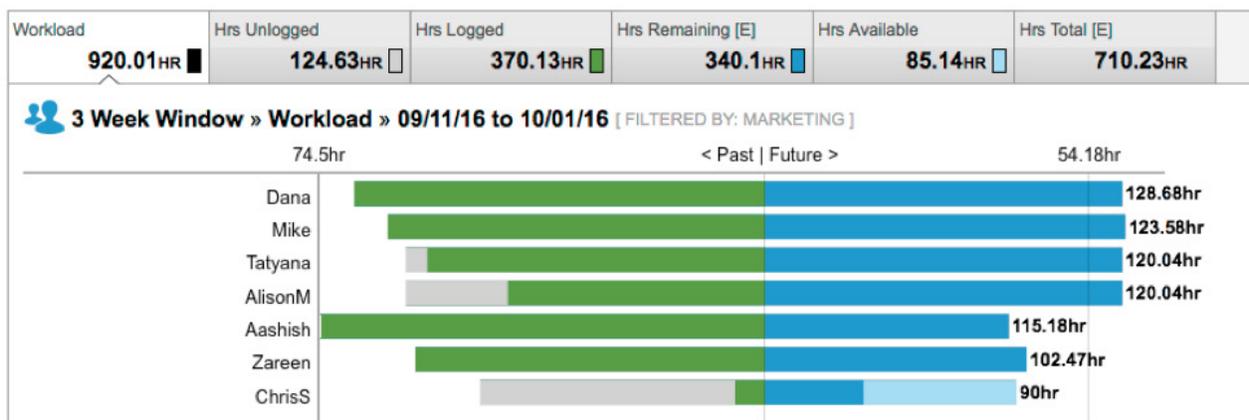
*Best Practice.* As teams get used to Dynamic Project Management, they become accustomed to seeing fluctuation in their task list and priorities. Still, you could minimize distraction for the project team, by working through this scenario when it has less impact, like later in the workday, or on a Friday afternoon.

## Scenario Five: Portfolio Balancing

Your workspace is a single source of truth, updating in real time whenever a member makes a change. When you need to reshape or shake up organizational priorities, there's a wealth of data to guide you.

Run reports to examine trends, evaluate project workload, analyze hours spent and those remaining. Carve out time for PMs and decision makers to meet. Move projects around. Examine the backlog and pending projects to rescue anything that might be languishing. Mark things done if they won't move forward.

*Best Practice.* Notify the rest of the workspace that priorities, estimates, and assignments may be in flux during this time frame. Let people know when their My Work tab will accurately reflect priorities again.



## Tools for Successful Scenario Planning

- **Communication.** Outline methods PMs will use for scenario planning in your LiquidPlanner Playbook. List the expectations and communication strategies for each type of scenario so team members are comfortable with the process.
- **Estimating.** At the start of any project, widen the ranges when there's more uncertainty. For instance, you could do this when supporting a stakeholder with a reputation for mid-project overhauls. That way, when the inevitable happens, you're not scrambling to make up time. Wider ranges are also for occasions when you're told, "details to come" or "assignments TBD" and to support your team when they tell you that specification or order details are not complete. Tighten estimates only when you're confident the end is in sight.
- **Resource Management.** You can't plan for the future if you don't know who's going to be around to do the work. Use the Availability setting in LiquidPlanner to establish the number of hours a member's work can schedule in a day. Block out days and times when they're in meetings, or out of the office with Events. Use the Resource Workload Report to see when teams and individuals have at risk work and when there's capacity to take on more.
- **Information.** Workload, status, and trend reports not only look at the past; they provide a view into the future too. Use that information as a guide.

To learn more about how your business can benefit from LiquidPlanner visit [www.liquidplanner.com](http://www.liquidplanner.com).