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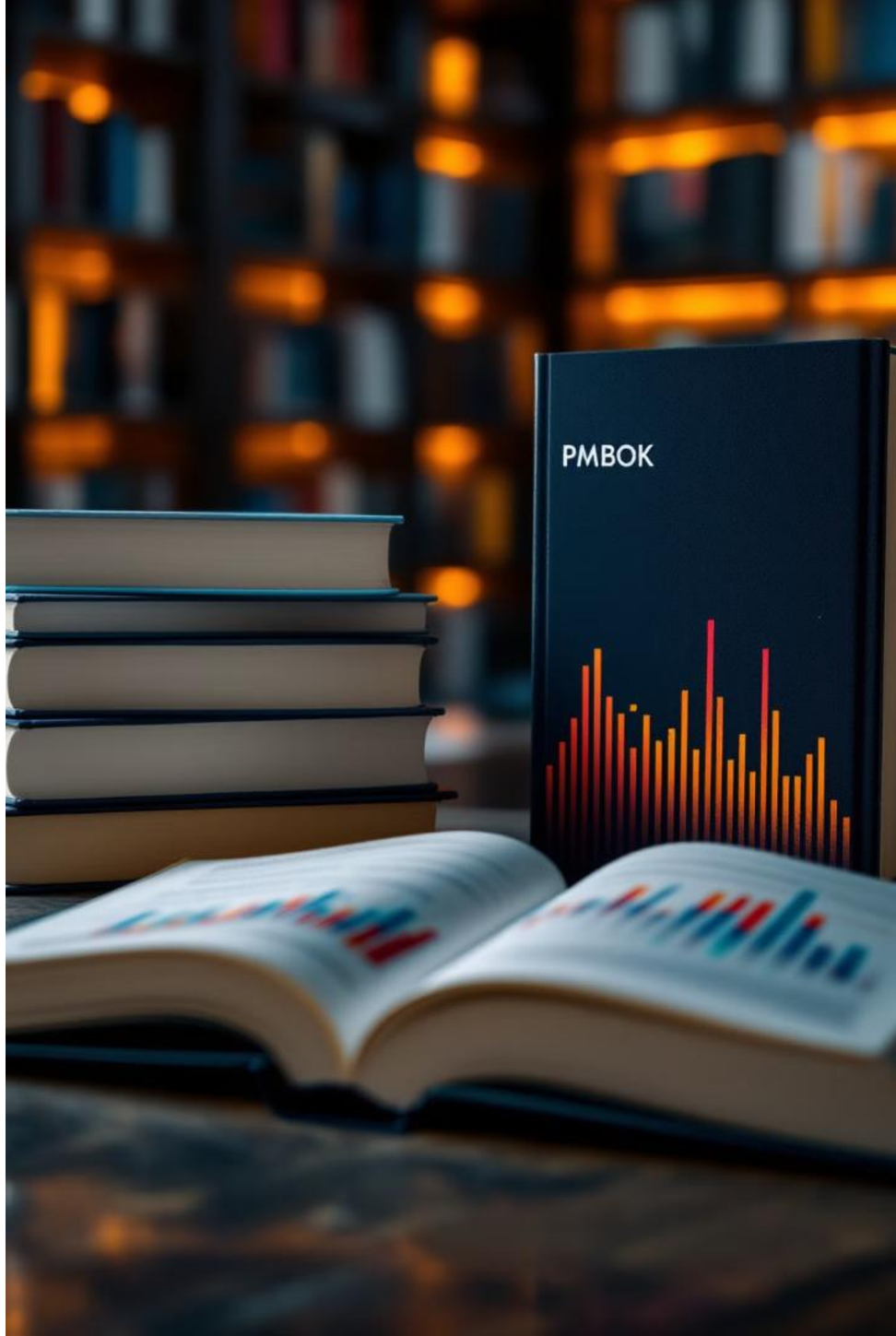
Planning Performance Domain

This presentation explores the Planning Performance Domain within the PMBOK 7th Edition. We will delve into key concepts, principles, and methodologies for effective project planning.



Project Performance Domains

Introduction to the Planning Performance Domain

PLANNING PERFORMANCE DOMAIN

The Planning Performance Domain addresses activities and functions associated with the initial, ongoing, and evolving organization and coordination necessary for delivering project deliverables and outcomes

Effective execution of this performance domain results in the following desired outcomes:

- The project progresses in an organized, coordinated, and deliberate manner.
- There is a holistic approach to delivering the project outcomes.
- Evolving information is elaborated to produce the deliverables and outcomes for which the project was undertaken
- Time spent planning is appropriate for the situation.
- Planning information is sufficient to manage stakeholder expectations.
- There is a process for the adaptation of plans throughout the project based on emerging and changing needs or conditions.

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Introduction to the Planning Performance Domain

Core of Project Success

Planning is the foundation of successful project management, laying the groundwork for efficient execution and effective delivery.

PMBOK Emphasis

The PMBOK Guide 7th edition dedicates an entire domain to project planning, recognizing its pivotal role in achieving desired project outcomes.

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Key Concepts and Principles

Defining Scope

Clearly identifying the project's boundaries and deliverables.

Creating Schedules

Developing a timeline for project activities, considering dependencies and resources.

Budgeting

Allocating financial resources to project activities and monitoring expenditures.

Risk Management

Identifying, assessing, and mitigating potential threats and opportunities.

Project Plan Development

Structured Approach

Developing a comprehensive project plan involves a structured approach that aligns with the project's objectives.

Process Integration

The planning process integrates with other project management domains, ensuring consistency and cohesiveness.

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Planning Variables

Project Scope

Defining the specific deliverables, constraints, and objectives.

Resources

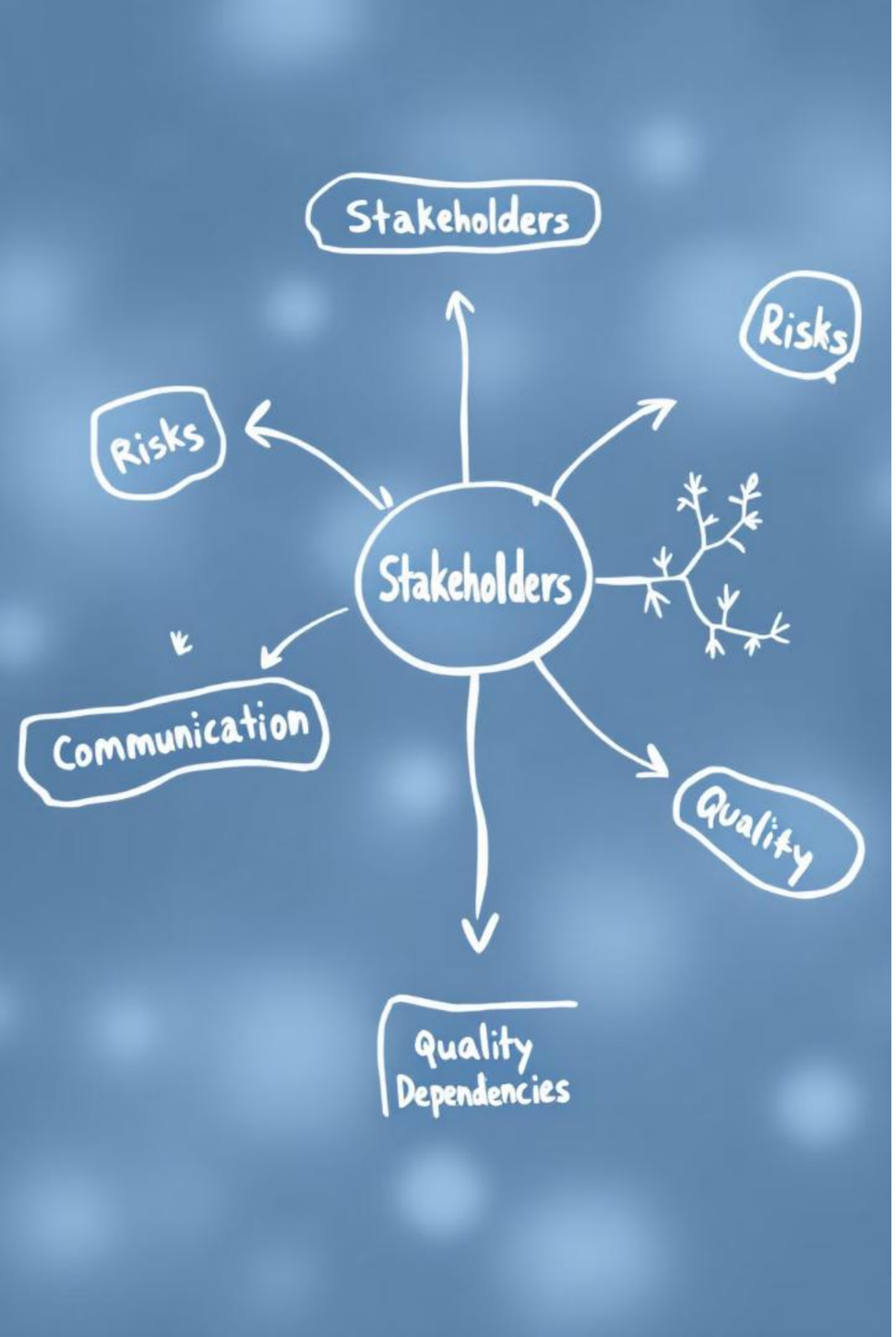
Identifying the people, equipment, materials, and financial resources required.

Time

Establishing a timeline for project activities and milestones.

Budget

Allocating financial resources to project activities and monitoring expenditures.



Planning Variables (Cont.)

Risks

Identifying potential threats and opportunities, developing mitigation plans.

Stakeholders

Recognizing the individuals and groups with an interest in the project.

Communication

Establishing effective communication channels and protocols.

Quality

Defining quality standards and ensuring that deliverables meet expectations.

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Delivery

Scope

Delivering the project's agreed-upon deliverables within the defined scope.

Schedule

Completing the project within the established time frame.

Budget

Staying within the allocated financial resources.

Quality

Meeting the project's quality standards and satisfying stakeholders' expectations.

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Estimating

Essential Function

Estimating is a critical aspect of planning, providing a foundation for resource allocation and schedule development.

Accuracy is Key

Accurate estimates are essential for ensuring realistic expectations and minimizing project risks.

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Estimating Cost: Quality/Accuracy

1

Level 1: Rough Order of Magnitude

Early stage, based on limited information, +/- 25% accuracy.

2

Level 2: Budgetary

More detailed, using historical data, +/- 15-20% accuracy.

3

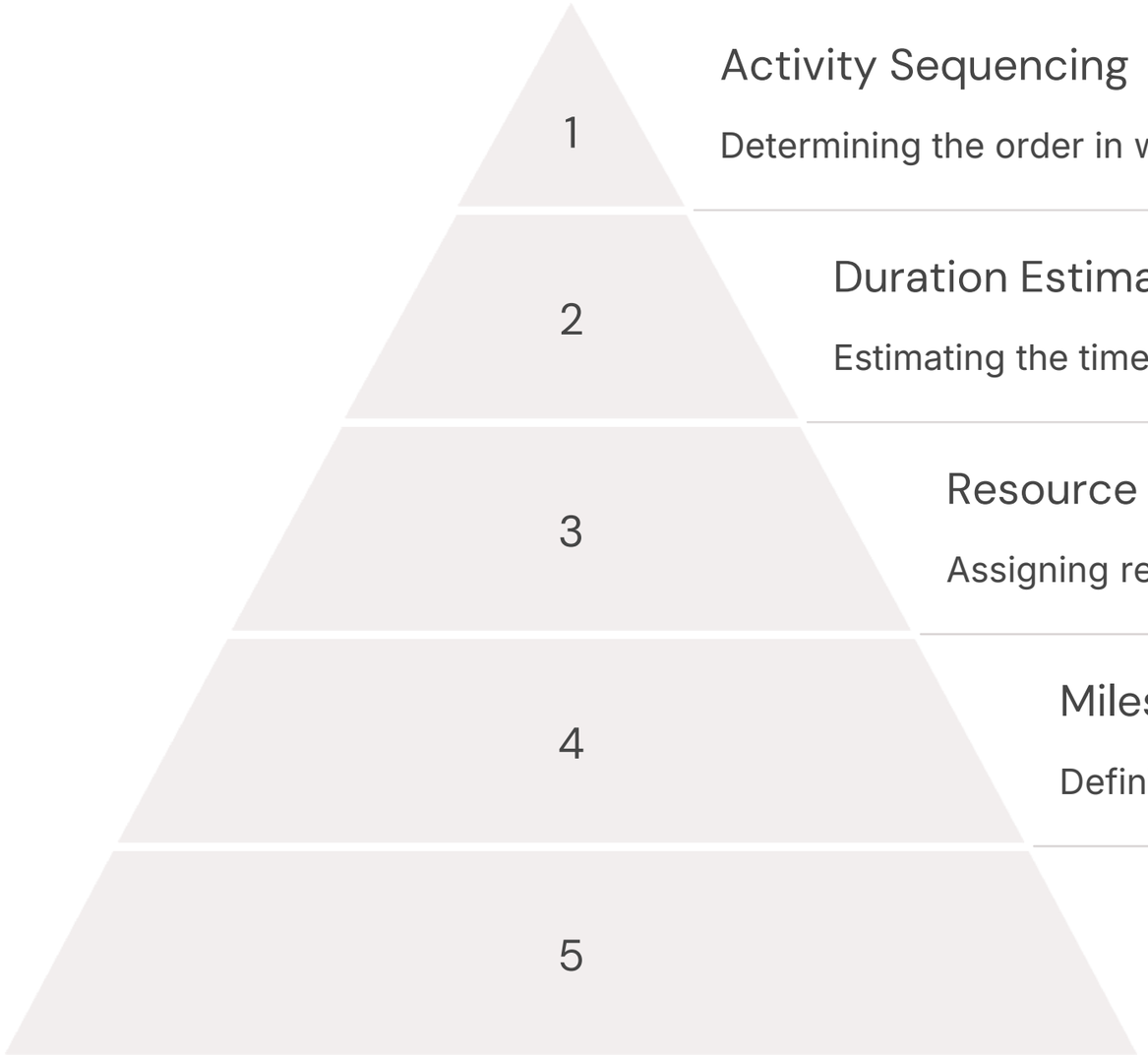
Level 3: Definitive

Highly detailed, used for bid preparation, +/- 5-10% accuracy.

Estimating Cost: Quality/Accuracy

Estimate	Accuracy	
Rough Order of Magnitude (ROM)	+/- 50%	• Most difficult to estimate as very little project info is available, made during **initiating process**
Budget Estimate	-10% +25%	• Used to finalize the Request for Authorization (RFA), and establish commitment, made during **planning phase**
Definitive Estimate	-5% 10%	• **During the project** and refined

Schedule Development



Activity Sequencing

Determining the order in which activities should be performed.

Duration Estimation

Estimating the time required to complete each activity.

Resource Allocation

Assigning resources to specific activities based on their availability.

Milestone Identification

Defining key project milestones and their deadlines.

Schedule Compression Techniques

Exploring techniques to shorten the project timeline.

Schedule Compression Techniques

Crashing

Adding resources to shorten activity durations, often involving increased costs.

Fast Tracking

Overlapping activities that are normally sequential, potentially increasing risk.

Types of Dependencies between Activities

1

Finish-to-Start

One activity must finish before the next can start.

2

Start-to-Start

Two activities must start at the same time.

3

Finish-to-Finish

One activity must finish before the other can finish.

4

Start-to-Finish

One activity must start before the other can finish (less common).

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Nature of Dependencies between Activities

Mandatory Dependency

1

A relationship that is contractually required or inherent in the nature of the work. This type of dependency usually cannot be modified.

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Discretionary Dependency

3

A relationship that is based on best practices or project preferences. This type of dependency may be modifiable.

External Dependency

2

A relationship between project activities and non-project activities. This type of dependency usually cannot be modified.

Internal Dependency

4

A relationship between one or more project activities. This type of dependency may be modifiable.

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Adaptive Scheduling

1

Agile

Iterative approach, allowing for adjustments based on feedback.

2

Critical Chain

Focuses on resource constraints and buffers to mitigate delays.

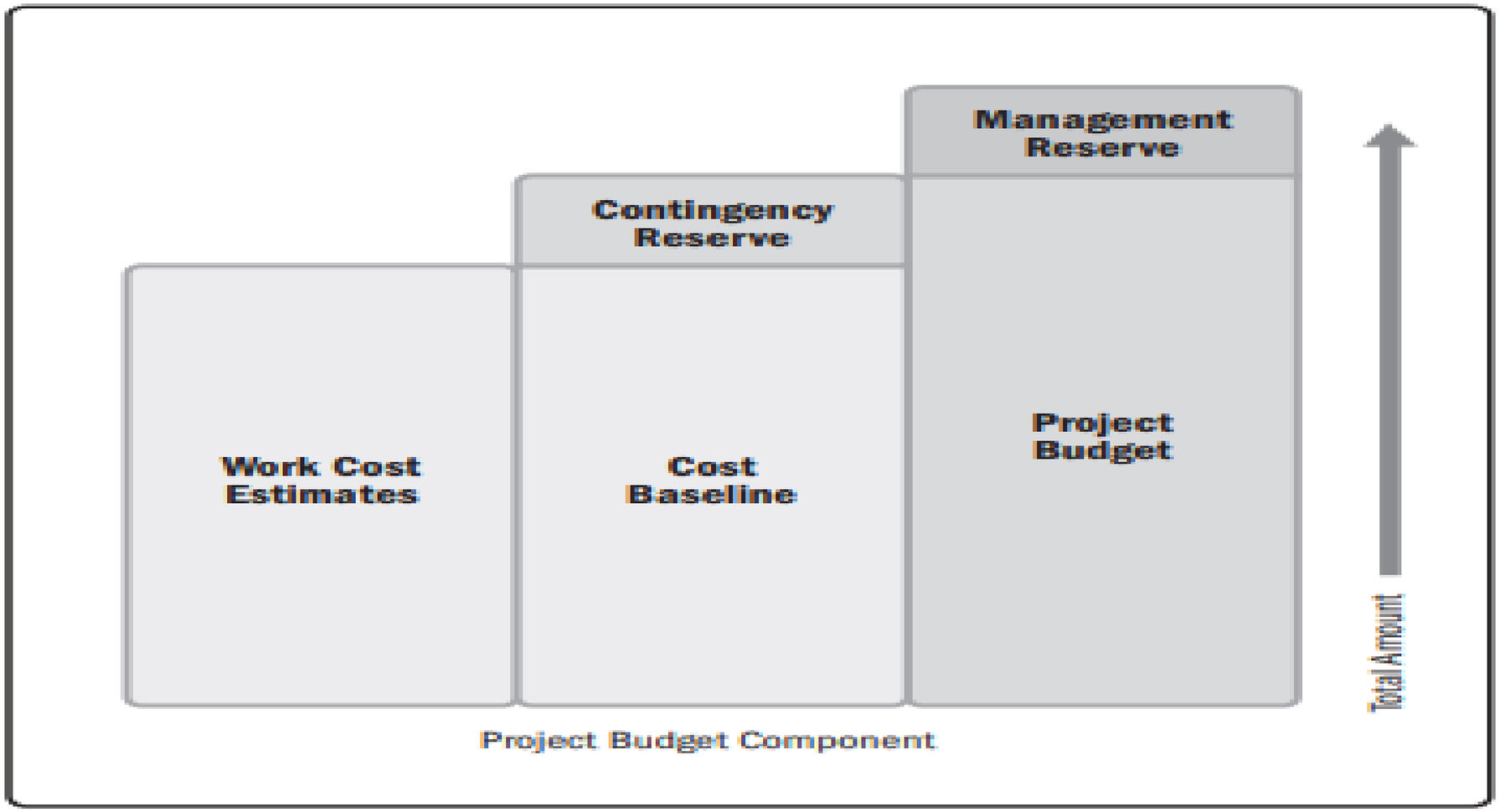
Budget

The *project budget evolve*s from the *agreed estimates* for the project. The information the previous section on Estimating is applied to project costs to develop cost estimates. Cost estimates are then aggregated to develop the cost baseline. The cost baseline is often allocated across the project schedule to reflect when the costs will be incurred.

The project budget should include ***contingency reserve*** funds to allow for uncertainty. Contingency reserves are set aside to implement a risk response or to respond to risk events shout they occur.

Management reserves are set aside for unexpected activities related to in-scope work. Depending on the organization's policies and organizational structure, management reserves may be managed by the project, the sponsor, product owner, or the PMO at the program and portfolio level. Figure 2-18 shows the budget build up.

Budget



Budget Build Up

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Project Change Management

Formal Process

Establish a structured process for evaluating and approving changes.

Impact Assessment

Assess the impact of proposed changes on scope, schedule, budget, and risks.

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Project Performance and Reporting

1. **Regular Monitoring**

   Continuously track project progress against the plan.

2. **Performance Reports**

   Generate reports to communicate project status and performance.

3. **Stakeholder Communication**

   Keep stakeholders informed about project progress, issues, and decisions.

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Monitoring and Controlling

Real-Time Monitoring

Continuously track project progress, identify deviations, and take corrective actions.

Performance Measurement

Establish metrics to evaluate project performance against objectives.

Change Control

Implement a process to manage and authorize changes to the project plan.

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Integrated Change Control

Request

Submit a formal request for a change to the project plan.

Review

Evaluate the change request and assess its impact.

Approval

Authorize the change and update the project plan.

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Controlling Stakeholder Engagement

1 **Communication**

Keep stakeholders informed about project progress and decisions.

2 **Feedback**

Actively solicit and address stakeholder feedback.

3 **Management**

Proactively manage stakeholder expectations and address concerns.

Controlling Scope

Scope Management Plan

Define the project scope, deliverables, and acceptance criteria.

Change Control

Establish a process to manage changes to the project scope.

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Controlling Schedule

1

Progress Monitoring

Track project progress against the schedule and identify potential delays.

2

Schedule Updates

Update the project schedule to reflect changes and maintain accuracy.

3

Contingency Planning

Develop plans to address potential delays and resource constraints.

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Controlling Cost

1

Budget Monitoring

Track actual costs against the approved budget.

2

Cost Variance Analysis

Identify and analyze cost deviations from the plan.

3

Cost Control Measures

Implement measures to mitigate cost overruns and ensure value for money.

Controlling Quality

Quality Management Plan

Define quality standards, processes, and metrics for the project.

Quality Control

Implement quality control measures to ensure that deliverables meet standards.

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Controlling Resources

Resource Management Plan

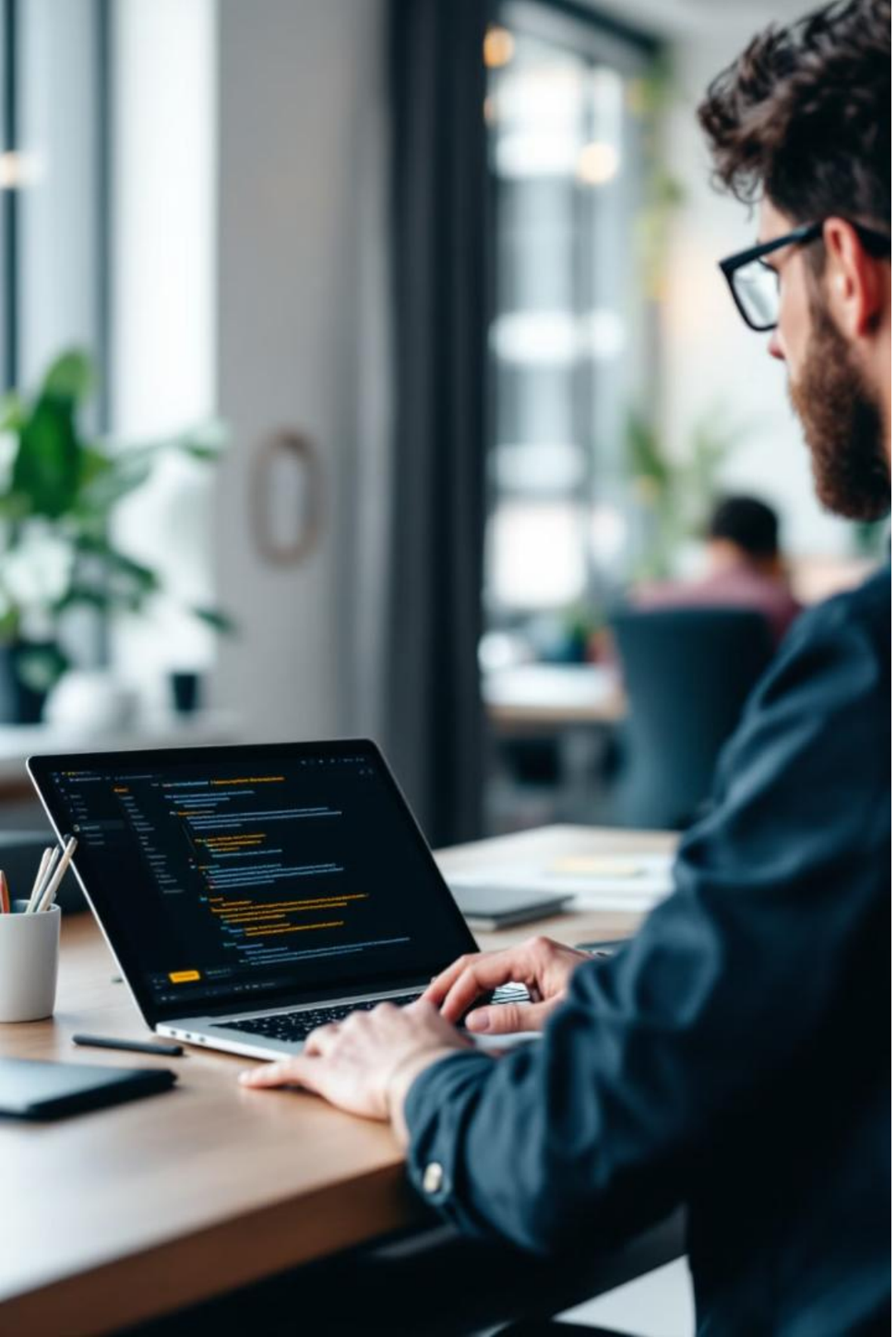
Identify the resources required for the project and allocate them to activities.

Resource Monitoring

Track resource availability, utilization, and performance.

Resource Optimization

Maximize resource utilization and minimize conflicts.



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Controlling Communication

1 **Communication Plan**

Define communication channels, protocols, and frequency.

2 **Stakeholder Engagement**

Keep stakeholders informed about project progress and decisions.

3 **Issue Management**

Establish a process for managing and resolving communication issues.

Controlling Risks

Risk Management Plan

Define the process for identifying, assessing, and managing project risks.

Risk Monitoring and Control

Track risk status, update the risk register, and implement mitigation plans.

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Controlling Procurement

1

Procurement Planning

Define procurement needs and develop a procurement strategy.

2

Vendor Selection

Evaluate and select qualified vendors based on defined criteria.

3

Contract Management

Manage vendor relationships, ensure contract compliance, and monitor performance.

Closing the Project or Phase

Project Closure Report

Document the project's final status, deliverables, and lessons learned.

Stakeholder Acceptance

Obtain formal acceptance of project deliverables from stakeholders.

Project Closure Meeting

Conduct a final meeting to review project outcomes and lessons learned.

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Lessons Learned

Knowledge Capture

Document insights, challenges, and best practices from the project.

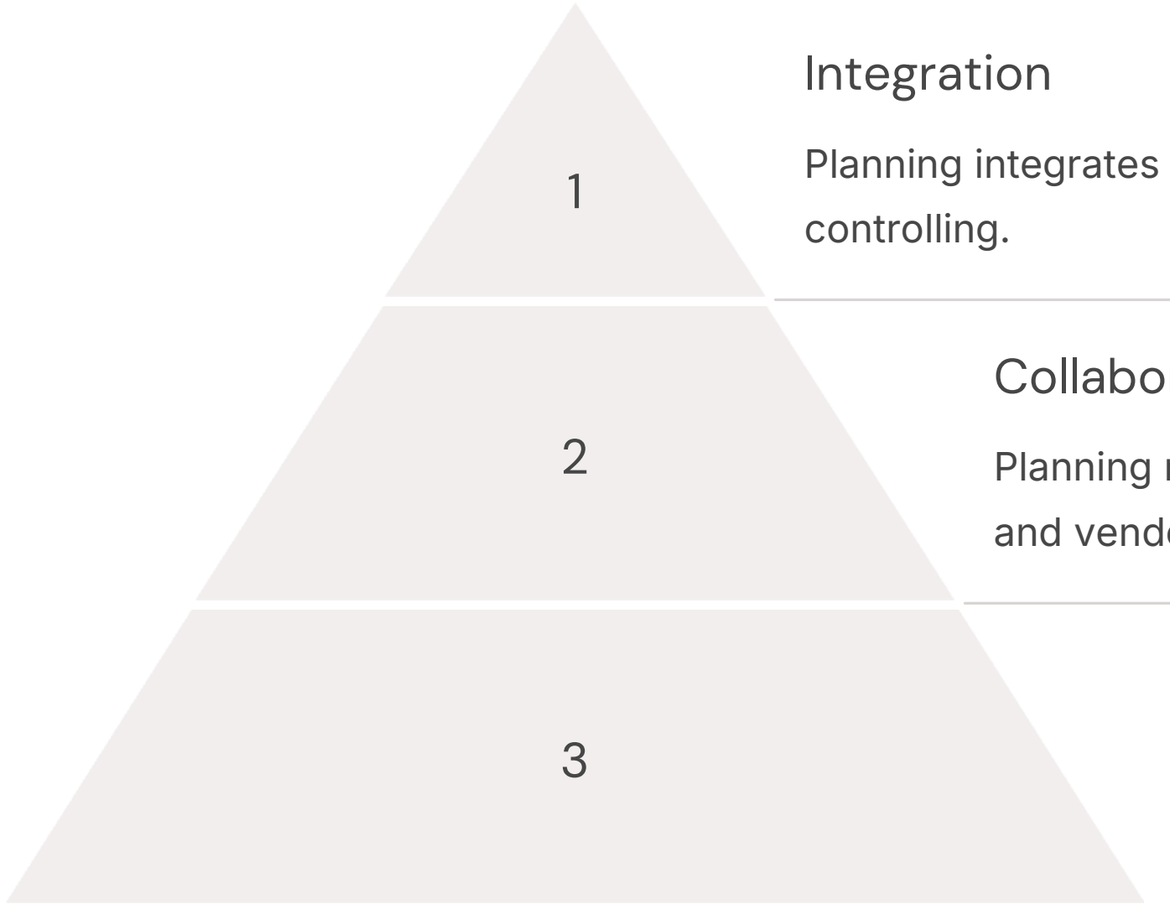
Process Improvement

Identify areas for improvement in project processes and methodologies.

Future Planning

Apply lessons learned to future projects for better planning and execution.

Interaction of Planning with Other Performance Domains



Integration

Planning integrates with other domains, such as execution, monitoring, and controlling.

Collaboration

Planning requires collaboration with stakeholders, team members, and vendors.

Continuous Improvement

Planning should be an iterative process, adapting to changes and lessons learned.

Interaction of Planning with Other Performance Domains

Planning activities and artifacts need to remain integrated throughout the project. This means that planning for the performance in terms of scope and quality requirements aligns with delivery commitments, allocated funds, type and availability of resources, the uncertainty inherent in the project, and stakeholder needs. Project teams can require additional planning artifacts depending on the type of project. For example, logistics plans will need to integrate with material and delivery needs, testing plans will need to align with quality and delivery needs and so forth.

Checking Results

Checking Outcomes –Planning Performance Domain

Outcome	Check
The project progresses in an organized, coordinated, and deliberate manner	A performance review of project results against the project baselines and other measurement metrics demonstrates that the project is progressing as planned. Performance variances are within thresholds.
There is a holistic approach to delivering the project outcomes.	The delivery schedule, funding, resource availability, procurements, etc, demonstrate that the project is planned in a holistic manner with no gaps or areas of misalignment.
Evolving information is elaborated to produce the deliverables and outcomes for which the project was undertaken.	Initial information about deliverables and requirements compared to current information demonstrates appropriate elaboration. Current information compared to the business case indicates the project will produce the deliverables and outcomes it was undertaken to deliver.

Checking Results

Checking Outcomes –Planning Performance Domain

Outcome	Check
Time spent planning is appropriate for the situation.	Project plans and documents demonstrate that the level of planning is appropriate for the project.
Planning information is sufficient to manage stakeholder expectations.	The communications management plan and stakeholder information indicate that the communications are sufficient to manage stakeholder expectations.
There is a process for the adaptation of plans throughout the project, based on emerging and changing needs or conditions.	Projects using a backlog show the adaptation of plans throughout the project. Projects using a change control process have change logs and documentation from change control board meeting that demonstrates the change control process is being applied.

Conclusion and Key Takeaways

Planning is Essential

Effective planning is crucial for project success, setting the stage for efficient execution and delivery.

Continuous Process

Planning is an iterative and ongoing process, adapting to changes and lessons learned.