

# How to build a realistic project schedule (when you're not the expert)



with  
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&  
Alan Morgan



# BrightWork

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# Projects . Portfolios . SharePoint .

**Start** managing projects with best-practice templates and dashboards.

**Evolve** project management with one complete SharePoint solution.





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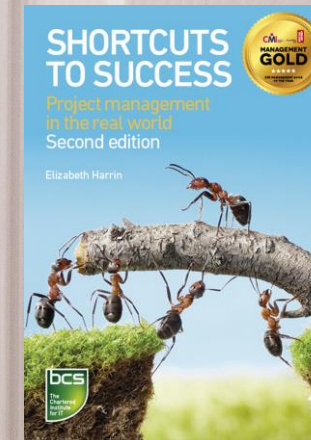
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elizabethharrin



# Quick Poll

**How many of you are  
using SharePoint for  
Project Management?**

# Today we'll cover

01

## 3 essentials

What you need to build a realistic schedule

02

## How to create the schedule

What to look for and how to build a schedule that works

03

## Your next steps

Simple ways to work confidently with subject experts

**1**

**The 3 essential elements for your  
schedule**

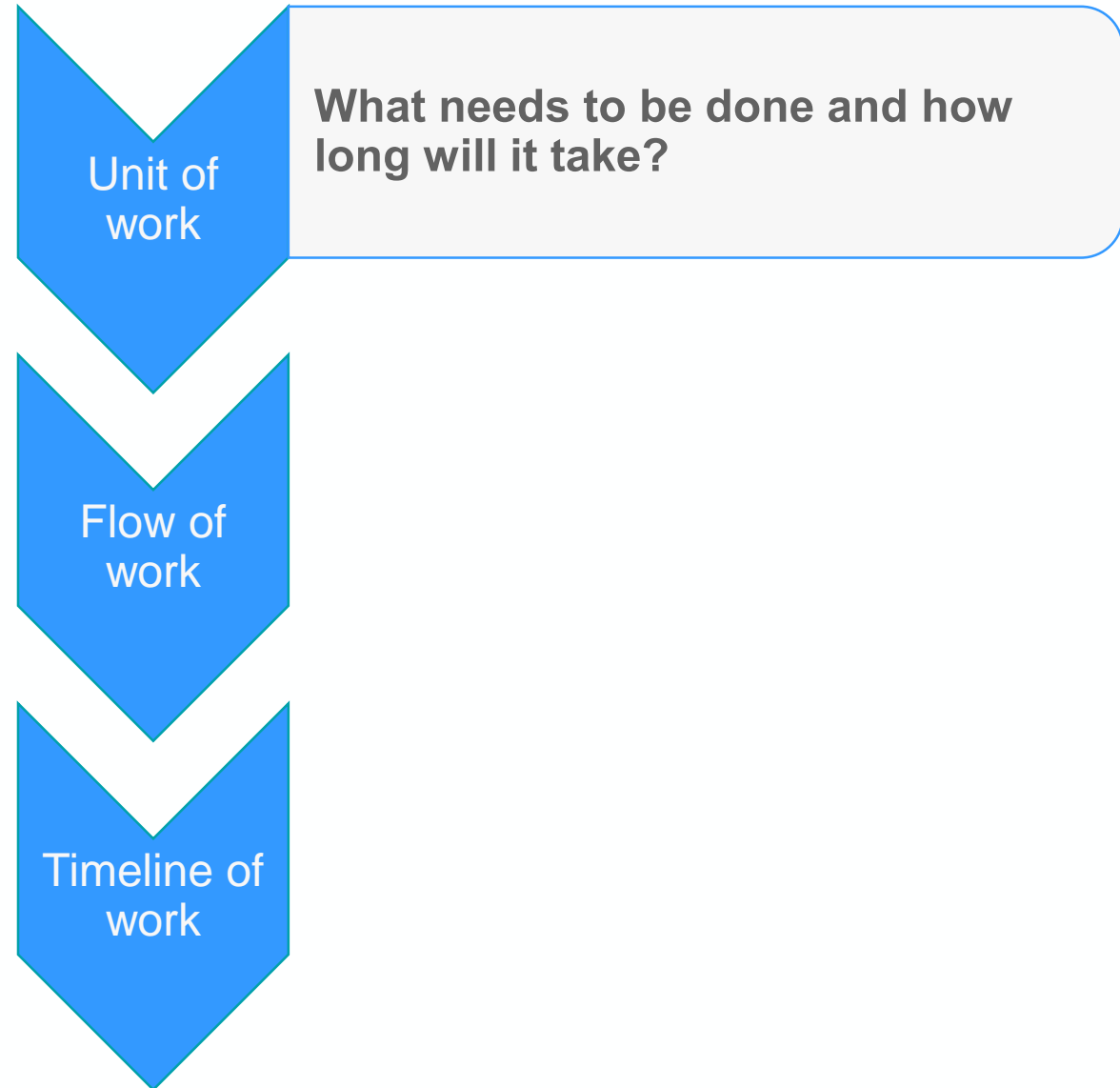
**Ask the right  
questions  
to get the right  
data**

# You need these things

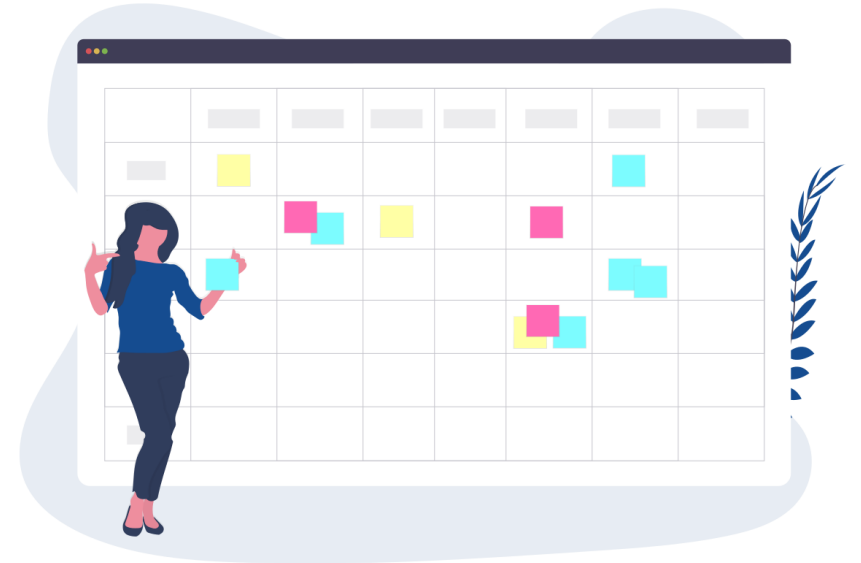




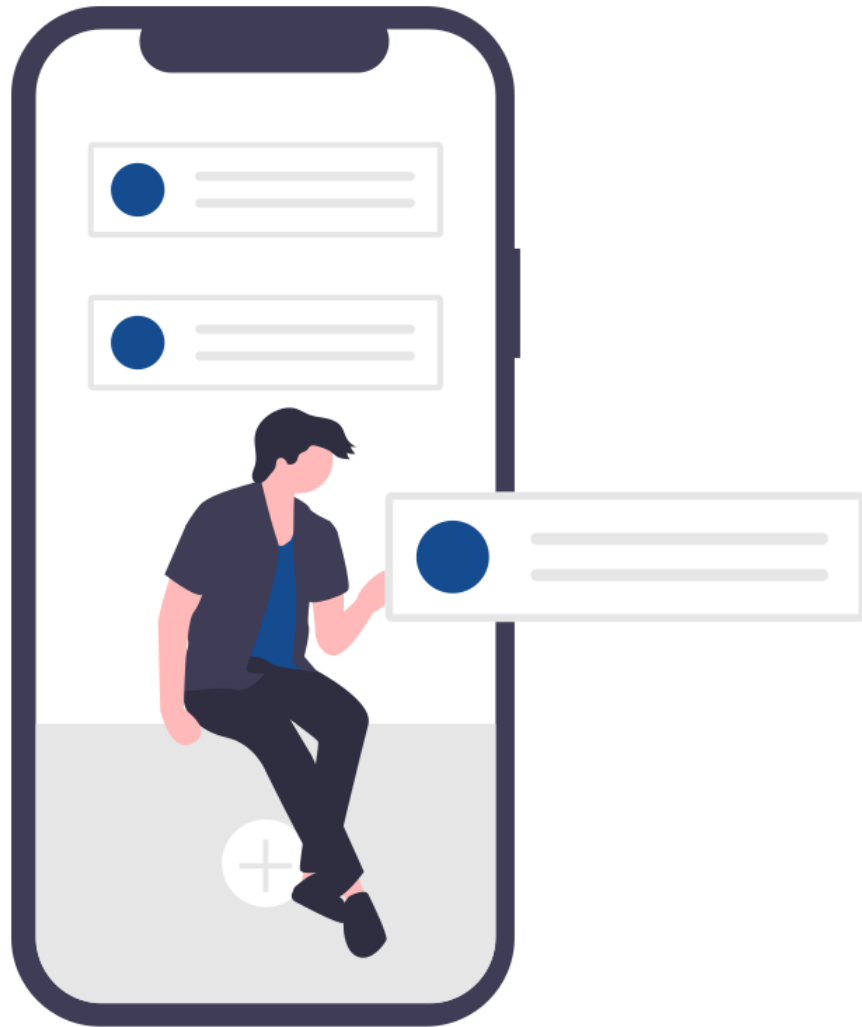
# You need these things



**To get that,  
you need  
estimates**



**There are**  
**two different**  
**ways of**  
**estimating**



## Duration-based estimating

- How long will it take in elapsed time for the task to be complete?
- A 10-minute task might take 3 weeks for someone to complete the thinking part, make a proposal and get it approved.
- Most knowledge work is easier to plan like this.

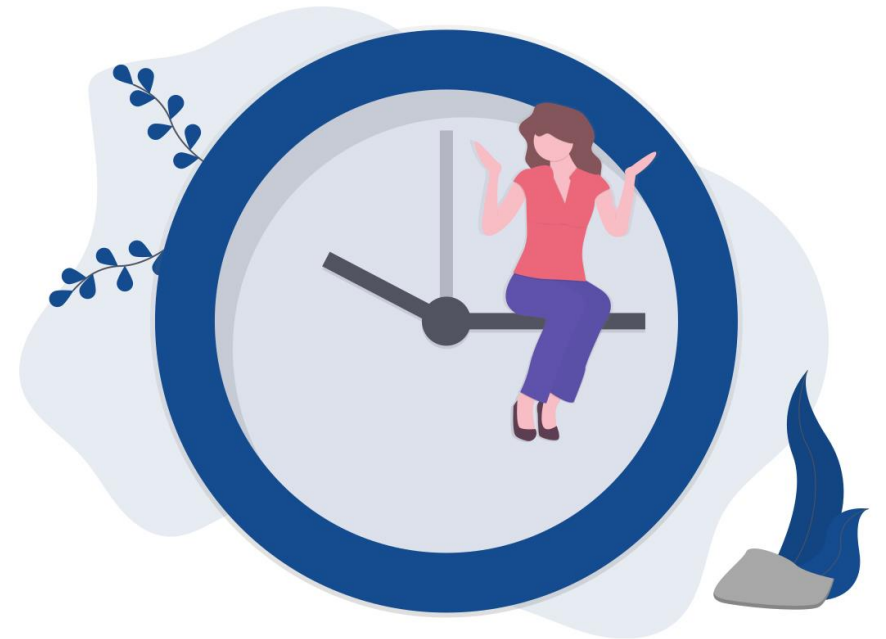
# Effort-based estimating



- How long will you actually be working on the task?
- Completing a system test might take 4 hours.
- Estimating like this is hard if you don't have dedicated resources.

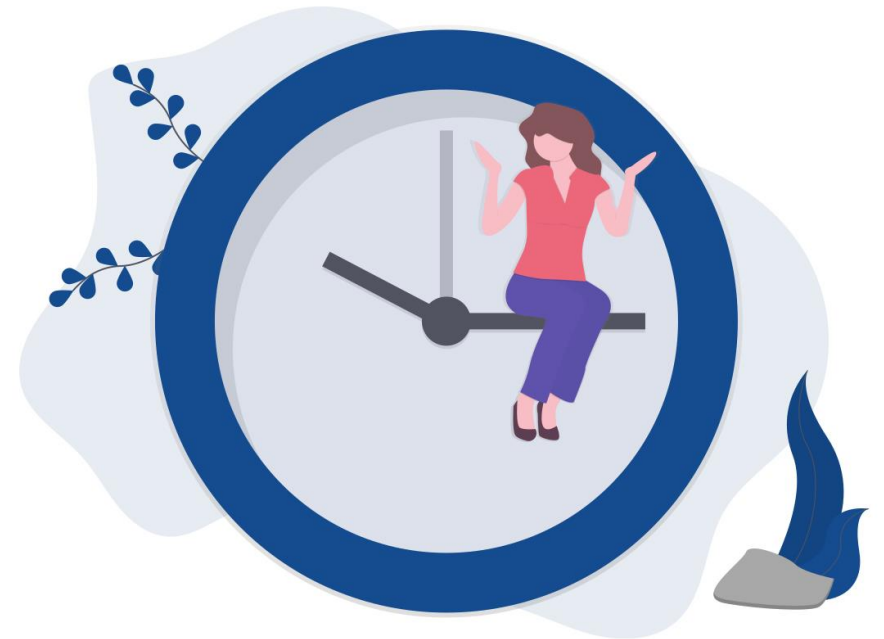
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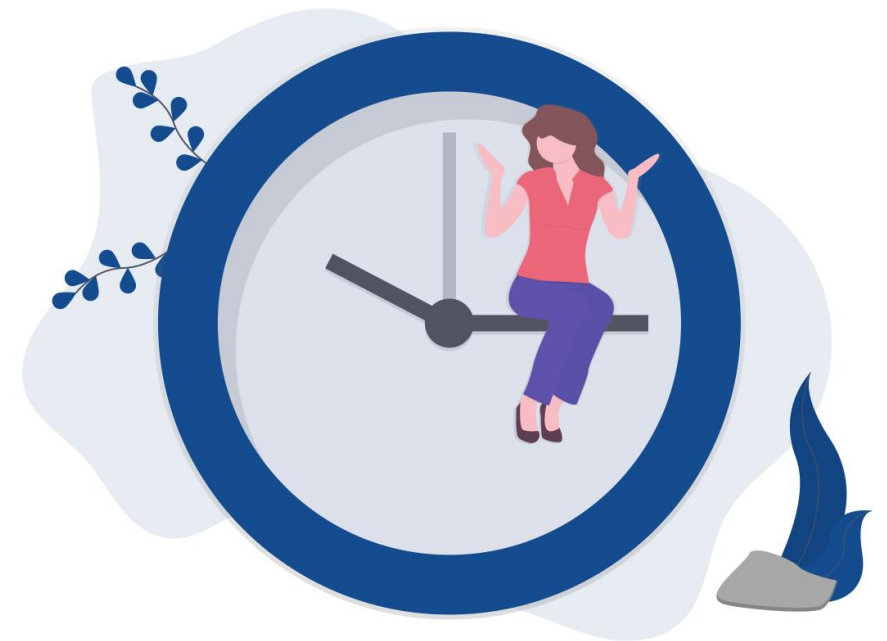
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- **Calculating numerically based on past data e.g. it takes 3 days to test 300 lines of code so it will take 5 days to test 500 lines of code (parametric estimating)**



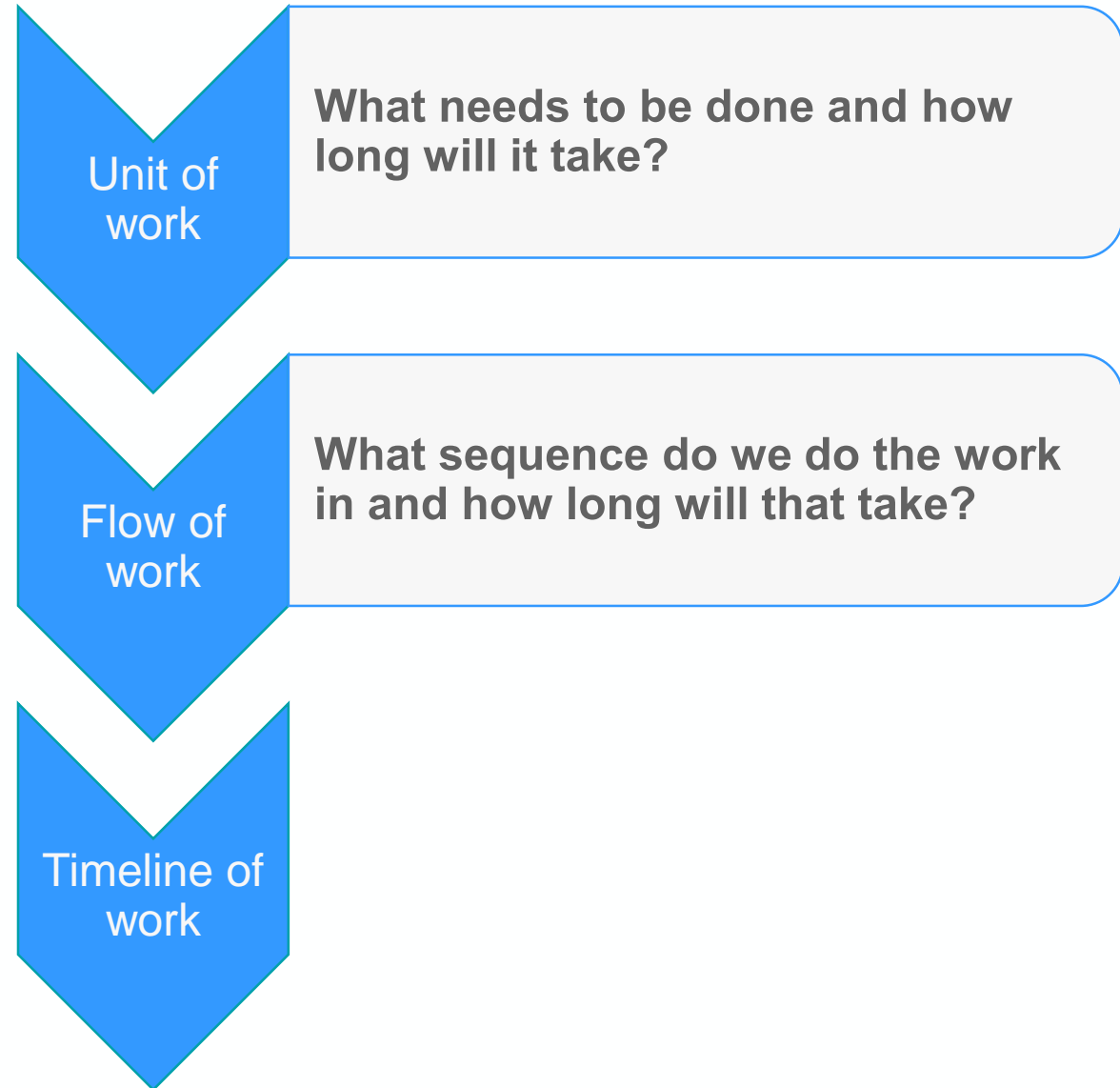


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- **Three-point estimating: take optimistic, pessimistic and most likely estimates. Use formula  $\text{Estimate} = (O + 4ML + P) / 6$**



# You need these things



# Putting tasks in order

# Types of dependencies

## Dependency type

Finish to Start (FS)

## Description

The most common type of dependency. Task A finishes, then Task B can start.

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Finish to Finish (FF)

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# Types of dependencies

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Start to Start (SS)	Both tasks have to start at the same time.
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Start to Finish (SF)	The most uncommon type of scheduling dependency. Task B cannot finish until Task A has started.

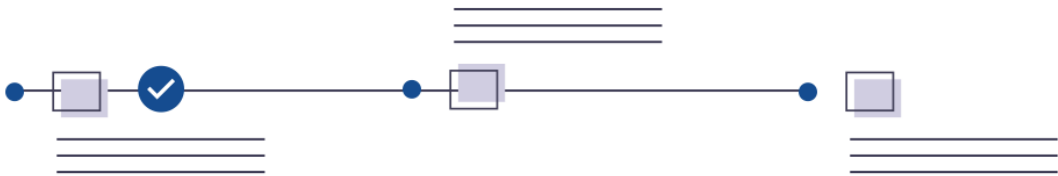
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Internal	A linkage between tasks in this project.
External	A linkage to something happening outside this project e.g. another project must complete before one of your tasks can start.

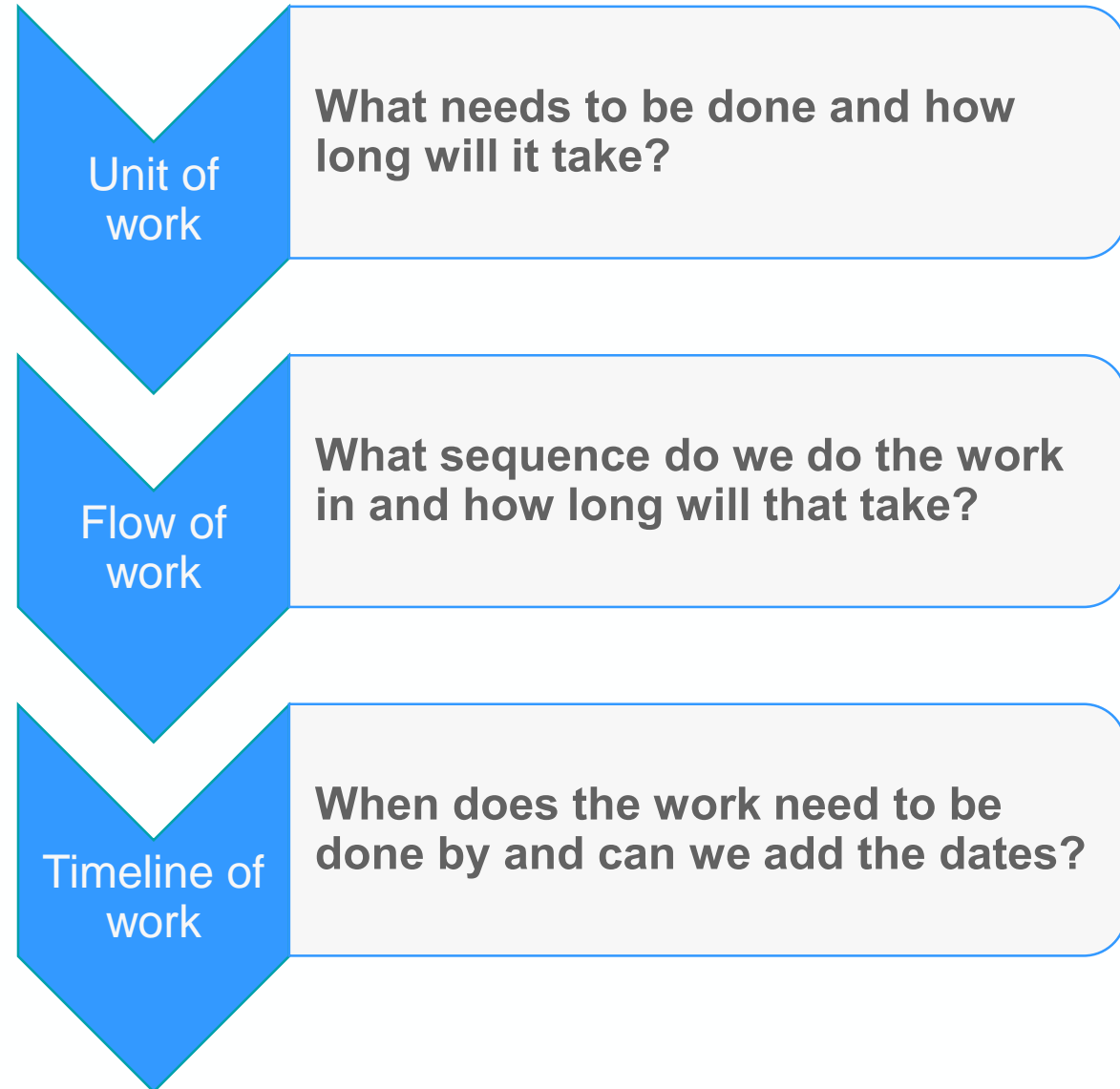


# Sequencing tips

- Sequence within a functional area first
- Then sequence functional areas together
- Focus on Finish to Start dependencies first
- Then link other types of dependencies



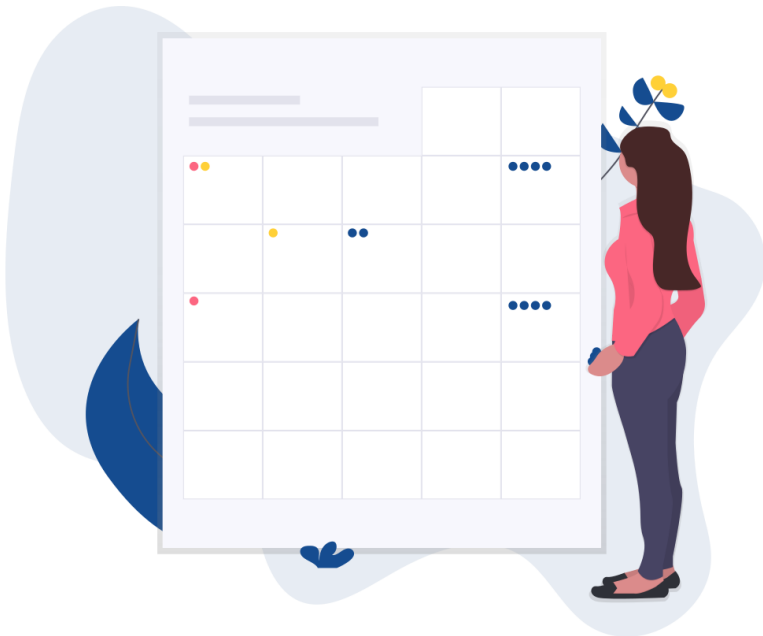
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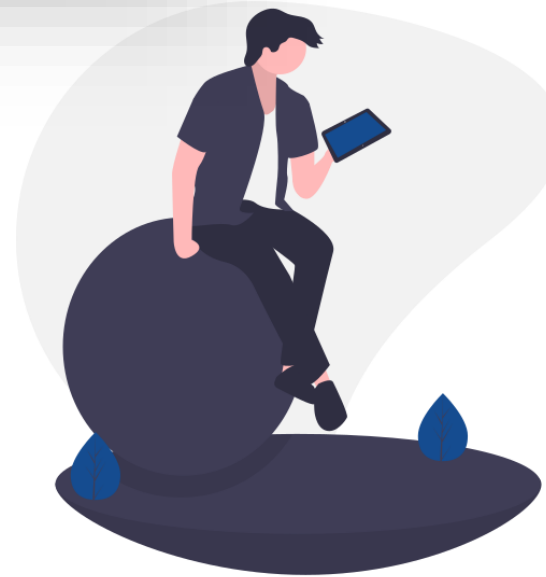
**If there's no  
target date  
this is easy!**

# Scheduling fixed date projects

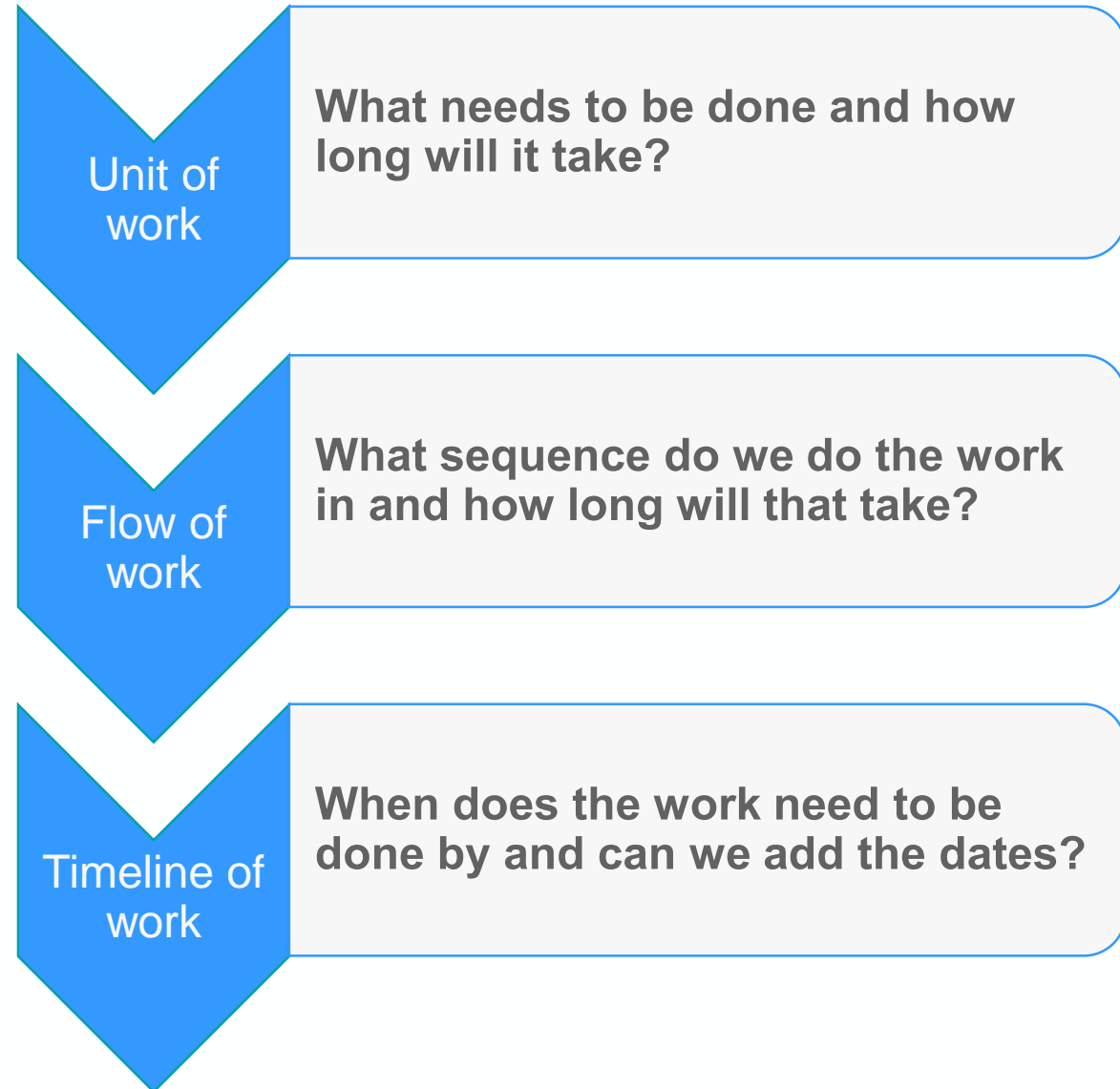
- Start at the end date
- Make a backward pass: schedule from the end to the beginning
- Hopefully the start date equals today or after today
- If it doesn't, and you can't cut task durations, then you can't meet the fixed date with the current scope



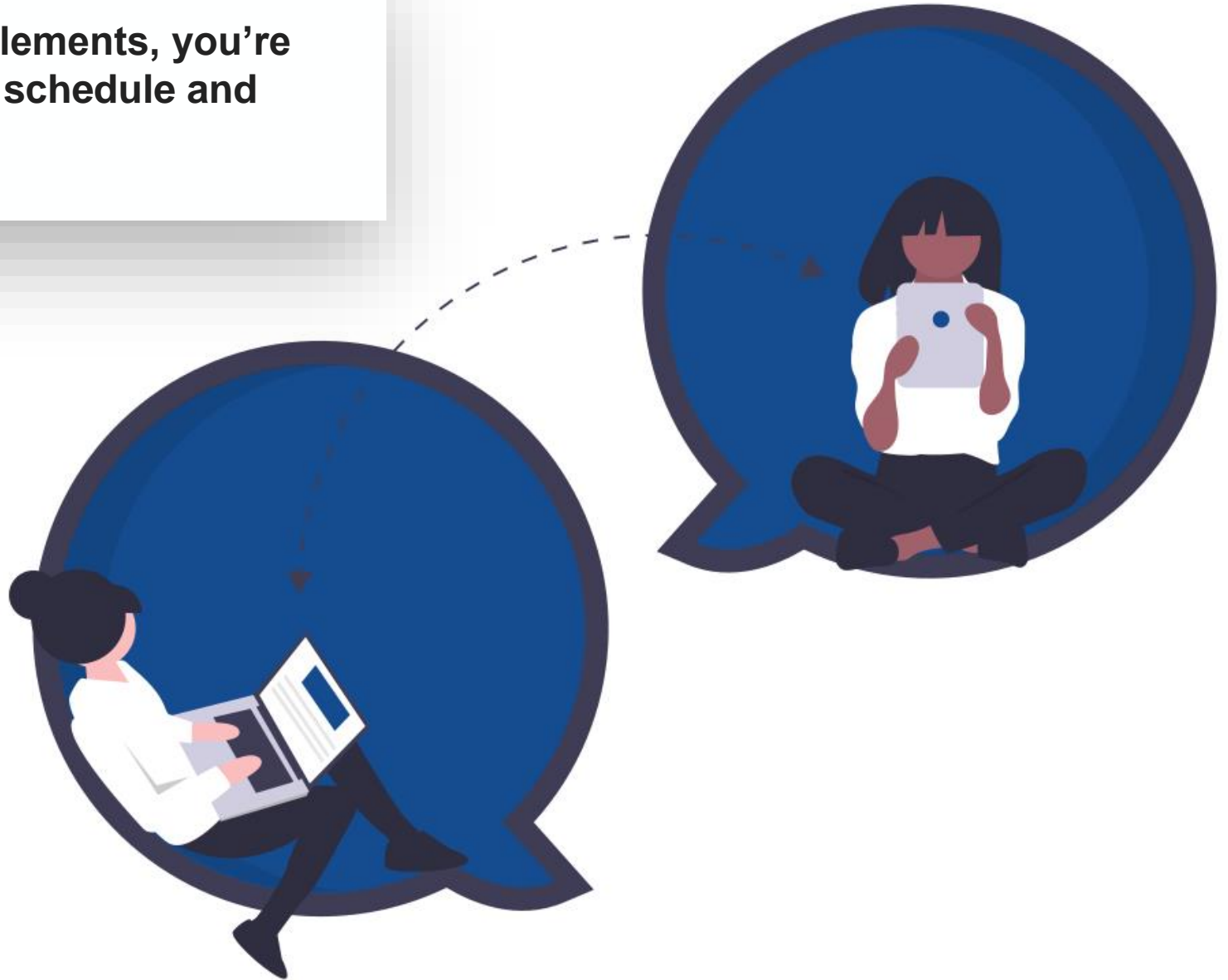
**Have a conversation about the risk of non-delivery. Negotiate on date, scope or resources until you have a solution that fits in the timescale and is achievable.**



# You need these things



**Once you've got the three elements, you're ready to start building your schedule and keeping it updated**



# 2

## **How to create your schedule**



# Start Projects With a well defined Schedule



## Plan Your Schedule

Build your Work Breakdown Structure (WBS) by leveraging the SharePoint task list.

## Update and adjust

Update individual items by simply dragging and dropping

Calculate or move your schedule with the In-Browser Task Scheduler



# Start Projects With a well defined Schedule

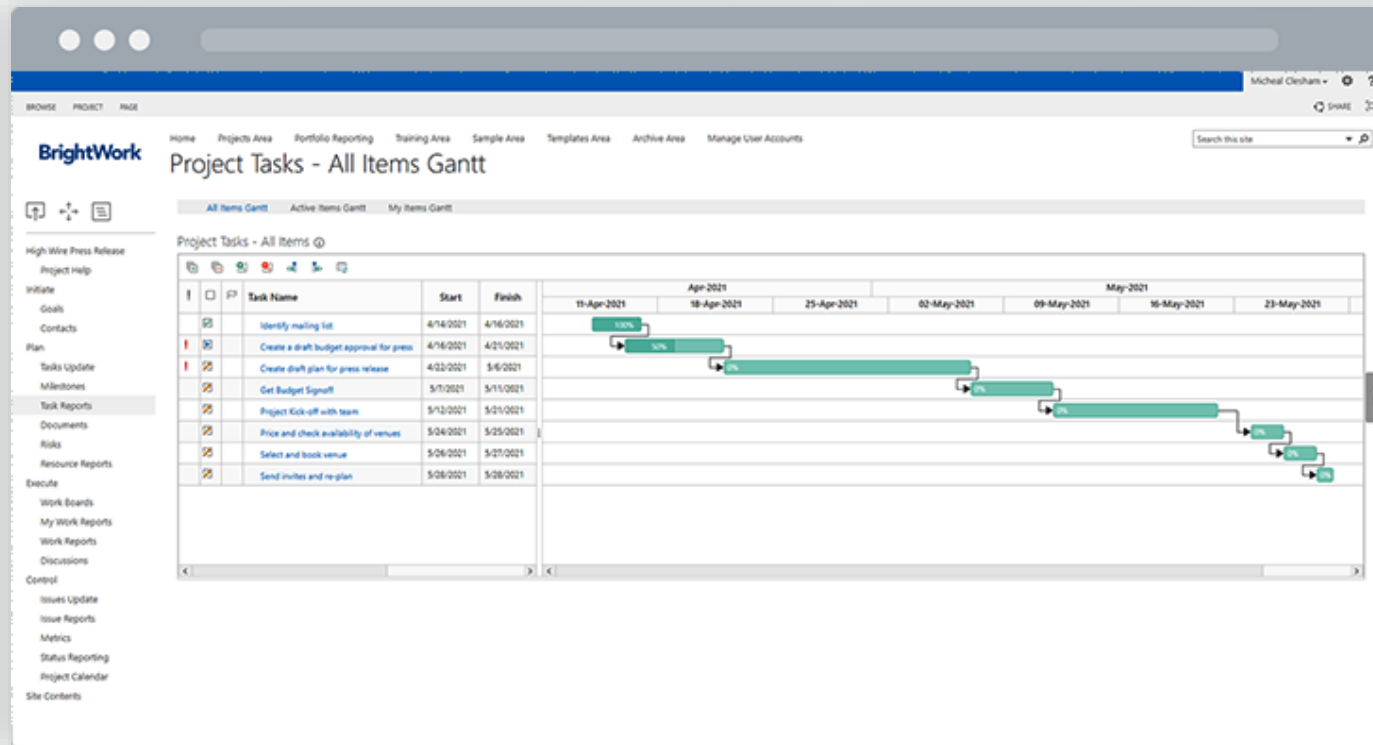
## Track your progress

Use My Work and My Work Due Soon reports so teams have full visibility and send automated emails so nothing falls between the cracks.

## Leverage Microsoft Project

For complex projects, the Project Structured Template in BrightWork supports a bi-directional sync with Microsoft Project Professional.

# Gantt Chart Web part



- Drag and Drop Items
- Calculate Schedule
- **ReCalculate** Schedule Automatically or Manually
- Zoom in and out

# 3

**Simple next steps for working  
confidently with experts**

# Get the right people



All functional areas should be represented

Appoint workstream leaders

Your schedule only needs to include high-level information if they have their own schedules

# Talking to experts



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- ✓ **Show them the end result of what a schedule looks like so they can see an example of what you are trying to get to**
- ✓ **Don't talk about dates until you have clarity on tasks**
- ✓ **Make connections – ask who else needs to be involved or made aware. You are the glue!**

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- ✓ Aim to breakdown tasks to components that can be easily tracked. A week's duration is a good benchmark
- ✓ Plan in milestones – one a month is a good frequency
- ✓ Decompose the tasks until it feels pointless to go any further – use your judgement

# Conversation prompts for scheduling chats



- What are the steps for this task?
- What input do you need from other teams?
- Who else needs to know about this work?
- What testing is needed?
- What are the consequences of something going wrong?
- Is there anything we could do to make the work go faster?
- What help do you need right now?

**Tasks + estimates + resource availability +  
visual representation = schedule**



**There is no magic wand for scheduling. Look at historical data. Create stability in the team. Focus on the deadline. Stay curious. Use software to make the plan transparent. And cross your fingers!**



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# THANK YOU

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