Post-It® Planning

By Simon Harris, PMP, CGEIT, Ex PRINCE2® examiner

From the Editor: Next month (December 2010) the asapm newsletter will introduce a resource that should be of great value for many of our readers. We will not say too much about that offering right now, but the purpose of this section of our newsletter is to re-introduce our readers to the brilliant, sometimes quirky, useful and insightful style of Simon Harris. Simon's works are not necessarily conventional. Nor are they for the ADD inclined. Instead, they are best for those who wish to dive into the fray and perform. They have been printed elsewhere, but Simon offers them to us as well. Please enjoy!

Just about every project management training course espouses the self-adhesive sticky-note as a planning tool. Do you actually plan with them? You should do!

Roots
Sometimes the roots of accepted wisdoms are lost. Let us review in order that unspoken assumptions are replaced by explicit reasoning.

Social Planning
Planning is a social affair. When done properly planning shares understanding of an end point across those involved. Planning with sticky-notes on a wall provides a group thinking tool that has multiple attributes helpful to building teams and plans.

A good plan is the sum of the team's experiences applied to a required future world state. That requires open debate to explore alternative ideas.

Unfortunately frank exchange of ideas requires more social, tribal bonding than the average project team posses – at least to start with.

Pandering to the Brain
In '95 US doctor Peter Strick discovered that the cerebellum, the part of the brain involved in the control of movement is also important for cognitive processes, working memory, learning, attention, perception and planning future behaviour: it seems people 'think better on their feet'.

Disagreement
It is also true that people debate ideas better when they are able to break the link between person and idea. Standing at a wall allows eyes to focus on the shared point of debate not eye-to-eye with the person expressing the alternate view.

Disassociating an idea from the person who contributed it diffuses inter-personal challenge while expression of disagreement allows team exploration to find a course of action that the group agree is relevant and realistic for them.

Team Building
Reaching agreement on how to achieve the desired result, who contributes what, when and how is a process that creates the motivation or buy-in that is so often talked about in wistful tones.

As Eisenhower (or Von Moltke?) said "Planning is everything, the plan is nothing". The first reason is the social, tribal team aspect; the second is preparation for when we are off-plan – more on this in a moment.

Size and Dimensions

The Post-It™ based wall planning session maintains a flexible, evolving record of the team's contributions and conclusions. [A quick digital camera snap and later transcription allows documentation in your favourite software tool.]

As a tool the wall of notes supports dimensions such as decomposition or time-line and perhaps more if tricks like colour pens and colour notes are used.

A 'limitation' might be "just how many people and Post-Its are practical to manage?"

Natural Limits - 1

In 1956 George Miller published "The Magic Number Seven ±2: Some Limits on Our Capacity for Processing Information". If we use Miller's insight we will divide any project goal into five to nine deliverable results, or phases or reporting lines depending on whether we are planning outcome, realisation or allocation of responsibility.

If each of these is further broken into 7±2 we arrive at circa 50 elements of any project at any management level. A good rule of thumb.

Where greater granularity is useful the team should either be very experienced (different short term memory, working and long term memory dependencies) or be delegating to specialists with less breadth to accommodate greater depth of subject matter expertise.

Natural Limits - 2

Post-it™ based planning provides a natural check on granularity or detail before subdivision is needed and thus suggests the number of management levels a project team needs!

Natural Limits – 3

The project's customer should be concerned with a result, a 'what', while the technical team is concerned with the 'how'.

Thus another rule of thumb is project manager and customer use Post-It™ planning to define Product Breakdown Structure and acceptance criteria. Then the PM and technical staff add the development life-cycle to create Work Breakdown Structure and method statements prior to reorganising the work in a precedence network and estimating.

Just a Tool

The sticky note is not the crucial element. The discussion where the team creates a single record of shared understanding is the crucial element. That doesn't happen so well in meetings sat around a table.

When everyone makes a personal record of their interpretation of what was said differences creep in. Because protagonists are eye-to-eye open disagreement is avoided or becomes personalised. Project scope and approach is subject to less challenge and the growth of belief is slowed or halted.

The sticky note is the catalyst: perhaps it is crucial!

Replanning

Paraphrasing Von Moltke "no plan survives first contact with the enemy". Done right the post-It™ sessions threw-up and debated many alternate solutions whose merits could not be assessed at the time.

During the project's execution a shared history of alternate, valid, unselected options leads to swift agreement on a revised route to the objective.

On the correct use of Sticky-Notes

There isn't too much to know but a few observations do help.

Sticky-notes fall off of most office wall coverings and white-boards cleaned with board cleaner. They also fall of faster if peeled off the pad from bottom to top so that the gummed portion curls up. When peeled from one side to the other and stuck to flip-chart paper they stick for much longer!

Sticky notes also work well on glass as do dry-wipe marker pens! Colleagues walking past 'fish-bowl' offices are often very intrigued to discover what is going on!

And a Final Thought

Many years ago as a newly appointed PM I worried that no one would 'accept' me in this 'different' role.

The simple fact is that by running the workshop, getting everyone on their feet, holding the pen as scribe and passing it to others to contribute immediately establishes "who is PM."

About the Author

Simon Harris, PMP®, CGEIT MOR, P2, IPMA-D speaks, consults, mentors and trains on governance of change (Simon is the one on the right in the photo at right).

Simon helps client's boards with ownership of benefits enablement from "light-bulb" to harvesting.

Simon helps PMs match controls to project uncertainty, complexity and board risk appetite.

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Editor's note: Simon is also nearing completion of a book, **PRINCE2 For Real**, to be published soon. Written with the same combination of deep insights and freewheeling irreverence as this article, a quick look at his draft shows this to be a good one!

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