technical tips and tricks

Best Practices: Task Planning

Document author:	Andy Jessop
Produced by:	Project Learning International Limited
	www.projectlearning.net

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Once you've created your project and have the basic building blocks of it in place, the next thing to do is define the tasks that allow the project to meet its aims. As with most aspects of using Microsoft Project, a little time (and thought) at this stage will pay you back many times over when your project plan is implemented.

Below you'll find a handful of best-practice tips and tricks, gained over many years of experience in working with people who plan real-world projects using Microsoft Project as their project management tool of choice.

1. Plan from the top down

The easiest way to plan and manage a project is to start by thinking about the overall project deliverables and then successively break down each element into greater detail.

As you've already defined your overall project information (within the Project Information dialog box), your next step is to list the key deliverables that will make up your project.

If you've created your project from a template, common deliverables may already have been defined for you. If not, then simply list them on your Gantt chart in approximately the order in which they will happen. Don't worry about exact sequencing at this stage, this will be explained in step 4 below.

If you're not sure what your key deliverables are, take a look at your project documentation; for example a "Project Charter", "Terms of Reference" or "Project Initiation Document". Within these documents should be listed the key areas of your project that you will be measured against and will also contain the scope items that will be of interest to your project's sponsor.

2. Add tasks and milestones

With top level entries listed (initially as simple tasks); you should now start adding the detailed tasks to accurately describe your project's scope. An ideal way to do this is to take each top level entry in turn and break it down into several sub-deliverables.

Try to ensure that each sub-deliverable is measurable and can be allocated to a team member (or members) to perform. This breaking down of work is commonly known as 'outlining' and is similar in function to outlining a Word or PowerPoint document using the Indent and Outdent buttons.

Regarding detail, don't be tempted to create tiny tasks with unnecessary detail in them – remember that every bit of detail you create here will have to be tracked and managed later on in the project's lifecycle.

Don't forget that you can use Task Notes to list detailed information about each task. If you are in an EPM environment, Task Notes are published automatically to team members assigned to relevant tasks.

Finally, don't forget the project's timescale in relation to detail. Tasks that happen early on within the lifecycle can be planned to greater detail than those nearer the project's end (which has still to be accurately defined) – especially if the project is to last several months. Many successful projects are planned using this 'rolling wave' principle, with additional task and assignment detail added as the project progresses through its lifecycle.

Now, look at adding key milestones. These milestones may already be defined as part of a project template. If they aren't, simply insert new tasks and make their duration values zero days.

Try to have milestones scheduled when major pieces of work (or expenditure) have concluded or are about to happen. Also place milestones at key decision points within the projects lifecycle.

One note on naming conventions; milestones are easier to read if they follow a noun-verb convention e.g. "Testing completed" or "Testing can commence"; task descriptions make more sense if they follow a verb-noun convention e.g. "Conduct user acceptance tests".

3. Enter durations against tasks

With tasks, summary tasks and milestones listed, you should now enter best-guess duration values against tasks. Don't worry about too detailed an estimate at this stage; remember that the resource assignments which you will subsequently add can change task duration values.

When entering durations, don't forget that you can drag task bars directly on the Gantt chart. Do be careful when dragging to use the correct cursor. The one to choose has a single arrowhead and can be found when you hover the cursor over the right of a task's bar.

The other two cursors, a percent symbol or a 4-way arrowhead (which can be found when you hover the cursor over the left and middle of a bar respectively) will either add percent complete progress to the task or schedule the task with a 'Start No Earlier Than' constraint.

If you're following the 'rolling wave' principle explained above, consider having large duration values for tasks late in the project's lifecycle. These tasks will invariably be broken down into smaller tasks with more discrete duration values as and when more detail about the project is known.

Another useful technique is to mark these large-duration tasks as being 'Estimated'. When a duration is estimated, a "?" symbol is appended to the task's duration. You can use the 'Tasks With Estimated Durations' filter to select tasks that are flagged as estimated.

4. Link related tasks together

Once you've defined your tasks, you should next place them in a logical sequence by linking them together. The easiest way to do this is to click on a predecessor task, hold down the CTRL key and then click on its successor task. Then click on the Link Tasks button on the Standard toolbar so that the successor will be scheduled to start once the predecessor is complete.

By linking this way, you can quickly create your project's schedule, confident that tasks will happen in the correct sequence, especially if tasks or milestones have multiple predecessors or successors.

An alternative (and intuitive) way to link tasks is to drag a link from predecessor to successor. You should however drag with care. Use the 4-way arrowhead and initially drag up or down, but not left or right. The cursor will change to a link icon, which you can then drop on a successor task's bar.

Try to ensure that the predecessor and successor bars are both visible on screen. If you have to scroll off screen, do be careful as scrolling can be very rapid. If sudden scrolling loses your position on the screen, don't panic. To get your task bars back in view, just click on the Go To Selected Task button on the Standard toolbar.

Using this approach you'll create a structured project plan encompassing all the relevant summary tasks, subtasks and milestones. By giving the tasks duration values and linking related tasks to each other, you'll be well placed to identify which tasks are critical to you completing your project on time.

projectlearning.net

Project Learning International Limited
PO Box 41-143, Lower Hutt 5047, New Zealand

info@projectlearning.net

www.projectlearning.net
www.projectlearning.co.nz