



## Practice Management

### Project Management Series: Project Work Planning - The process of planning and executing a project Questions & Answers Log

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- 1. Q:** With regard to sound training 4 points I was in a situation where I was hired as a new PM and the project was already 50K in the whole & the context of running a job in the red was not properly explained. I would love to speak with the speaker in greater detail. I'll try to contact you. **[Gail Ann J Goldstead]**

**A:** I'd be happy to talk to you about this. The simple answer is deal with what you still can control; i.e. the unearned fee remaining and the Estimate-To-Complete labor (hours and dollars). I'd also take a hard look at the schedule and see if the project could be accelerated without reducing the Scope of Services and contractual obligations you have with the client. Lastly, do you have the right staff assigned to do the project? If not do your best to make changes.
- 2. Q:** What are your thoughts on dealing with changes in project scope relative to changes to the work plan? **[Ralph Kurtz]**

**A:** It is fundamental to this discussion that you monitor/update your work plan whenever there is a change in scope. Also, your updated budget in accounting should reflect the updated work plan so revenue recognition will be accurate in the system.
- 3. Q:** Hi Steve, it is important to identify that managing staff utilization overall in the firm for all projects in critique in any size firm. All PM's need to understand the importance of maintaining staff utilization. Quality Control starts with the project work plan and proper staff utilization. **[William Burmeister]**

**A:** Hi Bill, nice to hear from you. I agree totally with your comments. Thanks much.
- 4. Q:** What are staffing cartoon sets? **[Armando Echenique]**

**A:** They are mock-up drawing sets done at the beginning of each phase of work that show what deliverables including details will be drawn.
- 5. Q:** Do you refer to AIA Document D200 - Project Checklist when preparing a Work Plan? **[Larry Whitlock]**

**A:** I do not but it would serve as a good guide to task lists. Be careful not to create a plan with too much detail that you cannot manage well.
- 6. Q:** What would you do if member(s) won't play on the "team"? **[Ralph Kurtz]**

**A:** There is not an easy answer to this issue and one you may not be able to control for many reasons. First I'd give them the feedback that they are not playing with the team and tell them what behavior would work for you. If that doesn't work see if you can make a change and tell your supervisor why. Obviously I would not want them on my next project.

7. **Q:** Without historic data (for example - with new start-ups or joint ventures) for work budgets, what is the best method to project time budgets? Or is this a total SWAG that you put down as a learned talent? [Daniel Wyckoff]  
**A:** Daniel, please review slides 19-28 for a start as that will give you a “high-level” understanding of the process. You need to get your feet wet, as they say and start to develop your own means and methods. At the end of the day you’ll have a negotiated fee to work with and your plan must respect that number.
8. **Q:** I have a small firm and struggle with how the extended negotiations are with the client - I feel like I am planning their project and they could take that info and walk away and use it with another architect. [Allegra Kochman]  
**A:** Sad but true.
9. **Q:** Planning as described seems so time intensive - how do you budget for that investment compared the the proportions of jobs one might win. [Allegra Kochman]  
**A:** The detail required for planning during negotiations is much less than after you have a contract and are ready to start the project. I do a good top-down view then a work plan view with resources loaded at the phase level. Mold them into your proposal and adhere strongly to the Scope of Services you can “afford” on the project. Good project plans don’t take a lot of time and if you are spending too much time you are likely planning to a level of detail that is not necessary.
10. **Q:** Where's Facility Programming done in your work planning? [Ralph Kurtz]  
**A:** Either in Phase 1 or 2, whatever works for you. Also, it could be a task in Phase 3 if you don't typically use Project Planning and Preliminary Design phases.
11. **Q:** Coming out of what has been a major adjustment for architecture firms due to the economy what is suggested to slowly staff back up and keep staff utilized in an unknown market? [William Burmeister]  
**A:** Bill, as it relates to this topic I'd say project work planning is even more important although I've always thought it should be fundamental to one's practice and culture, firm and project levels. Some firms have utilized contract employees in-lieu-of permanent, full-time staff and if the contract folks are a good fit and the backlog improves one can always change their status.
12. **Q:** What's your view of the Project Management Institute's recommendations on processes? [Ralph Kurtz]  
**A:** I endorse PMI and regularly review what they are up to.
13. **Q:** Is there a way to think of the time/cost investment as a proposition of the contract value? As a way to budget how much time to allot pre-contract as an investment in getting the job. [Allegra Kochman]  
**A:** I do not fully understand the question. There are too many factors that go into pre-contract processes so I cannot think of a good “formula” if that is the question. I do think that as a rule people believe the project planning process takes a lot of time; it does not and the more you develop your own path/methods the easier it gets (particularly as you build historical data).
14. **Q:** What is an example for "key monitoring question" #5 "shift costs from one task or phase to another"? [Aric Abblitt]  
**A:** This is a little “generic” admittedly but if one task is performing better than another you can simply shift resources and fees between tasks.

- 15. Q:** You mention talking to clients about deviations - do these softwares help track changes/updates to plan once work is under way? [\[Allegra Kochman\]](#)  
**A:** They absolutely help but it relates more to your process than to the software itself. Simply save the older version when an update happens and compare the two in terms of labor hours and dollars and schedule impact. Most programs will allow you to “Save Baseline” which is your initial plan but be careful with this; do tests projects first to make sure it does what you need in the end.
- 16. Q:** Is there a software product you recommend for small firms? [\[Allegra Kochman\]](#)  
**A:** I won’t make a recommendation as the common products like Deltek, Axium and Newforma all have good solutions. I’ve not used the Microsoft product that uses MS Project but it would be good to evaluate also. I do know that many small and mid-sized firms are using Axium.
- 17. Q:** My experience has been that the Project Manager does have not effective management control of the designer(s), and that the schedule and budget for the design phases have always been exceeded, thereby requiring a reduction in the budgets for the following phases. This causes incomplete and uncoordinated construction drawings which lead to problems during construction, and an unhappy client. Has this also been your experience? [\[Larry Whitlock\]](#)  
**A:** I’ve had this experience, sure. The firms I’ve been associated with have all gone through a culture shift at some point and this problem became less “acute”. Many times a grass roots approach worked well but at the end of the day the firm’s leaders must embrace change or it won’t happen. You can have a successful “Design Led Business” model that results in good design and financial performance.
- 18. Q:** Are these mac or pc programs? I am mac based. [\[Allegra Kochman\]](#)  
**A:** I do not know if the software folks have a mac solution or not. I suspect not.
- 19. Q:** Should the project plan be presented to the client before the fee proposal or maybe presented at the same time as the initial fee proposal? [\[Armando Echenique\]](#)  
**A:** Yes but be careful how you share the financial stuff if you share it at all. Demonstrate resources, tasks/scope and schedule in this process and an overall fee that relates to the plan.
- 20. Q:** For hours tracking, do any of the programs mesh with quickbooks, so repeat data entering is minimized? [\[Allegra Kochman\]](#)  
**A:** I do not think that Quickbooks works with any of these but check with the software companies.
- 21. Q:** Engaging the team - would it be appropriate to review the plan with the internal team on a weekly or bi-weekly basis? If yes, then an updated plan may be needed. [\[Michael Kennedy\]](#)  
**A:** I always created the plan and reviewed it with the project team regularly. Depending on the project size and scope most project plans can be reviewed monthly if there is a good plan to start with.
- 22. Q:** How is the ETC generated? Is the PM updating the forecast periodically? [\[James Cronenberg\]](#)  
**A:** Simply by looking at the tasks, resources and time needed to finish the project. Think of it like a new plan in itself. Yes, this works well in updating forecasts.
- 23. Q:** Please provide examples of WBS in agreement, and administration, etc. [\[Magdy Ibrahim\]](#)  
**A:** I don’t understand the question.
- 24. Q:** Can an example of the most simple work plan be provided? [\[Allegra Kochman\]](#)  
**A:** Please go to the websites for Deltek, Axium, Newforma and Microsoft as they have good examples.

- 25. Q:** Ok this is sort of being answered, but can explanation be given as to the type of detail that might occur in small and large projects, but that one might omit from the simpler smaller plan. [\[Allegra Kochman\]](#)  
**A:** I don't fully understand the question. Smaller projects require less detail and in many cases can be planned to Level 2 in the WBS. This approach loads resources at the phase level with no tasks or subtasks in the plan.
- 26. Q:** Are you aware of planning software that works with quickbooks? [\[Kathleen Sherrill\]](#)  
**A:** I do not think that Quickbooks works with any of these but check with the software companies.
- 27. Q:** If possible, please provide an example for metric used by management in evaluating a process that was documented. [\[Magdy Ibrahim\]](#)  
**A:** I don't fully understand the question. Firm metrics used in operations include: actual vs. forecasted revenue, profit targets vs. actual profit, effective multipliers on projects and for the firm, management and marketing costs.
- 28. Q:** Advice on software for small firms? [\[Kenneth Graham\]](#)  
**A:** I won't make a recommendation as the common products like Deltek, Axiom and Newforma all have good solutions. I've not used the Microsoft product that uses MS Project but it would be good to evaluate also. I do know that many small and mid-sized firms are using Axiom.
- 29. Q:** How does project planning process adapt to newer delivery methods (IPD) and BIM teaming efforts. Does the old PD, SD, DD, etc phases still apply? [\[Scott Mackey\]](#)  
**A:** I think the whole concept of the traditional phases needs to be evaluated; essentially starting with a "clean sheet of paper" as with BIM the phases don't have that clear break (i.e. start and finish) in deliverables. The traditional percentages of fees for each phase needs to be evaluated in this context also.