From vision to reality – strategy, business and project planning for your group

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From Vision to Reality

1: Strategy & Vision	Define where you want to get to and the route you will follow
2: Making a Business Plan	Detail what you will do to deliver the strategy and the outputs
3: Practical Project Planning	Maximise the chances of your projects being successful

From Vision to Reality

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From Vision to Reality

1: Strategy & Vision

2: Making a Business Plan

3: Practical Project Planning

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Strategy Planning – Content

1. **What is a Strategy and how is this different from a Business Plan?**

2. **How do I develop my Strategy?**

3. **How do I articulate my Strategy?**

Strategy Planning

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What is a Strategy?

Your Strategy defines a "map", specifically:

1. where you want to get to, and

2. the route you will take to get there

A Strategy should:

- Define the **realistic medium to long-term outcomes** that you would like to achieve

- Define the **customers** that you would like to support

- Define the **services** that you would like to provide to your customers

- Ideally be **driven by data** or other insight about the environment you operate in

- Provide everyone connected to your organisation with a **common purpose and clarity** around how what they do is aligned to the strategy

YOUR STRATEGY MUST ADAPT TO CHANGE

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Strategy Components

Your Strategy details what your purpose is, what is important to you and what you want to achieve

A Strategy should contain:

- **WHY** you exist – your **Mission** statement

- **WHAT** the future is that you aim to deliver – your **Vision** or **Purpose**

- **WHAT** you believe to be important – your **Values** and **Principles**

- **WHAT** outcomes you aim to achieve – your strategic **Goals** and **Objectives** and how you will measure these outcomes

- **WHAT** you need to be to progress the strategy – your strategic **Action Plan**

Mission, Vision and Values define your culture or DNA

Strategy Planning

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Mission, Vision and Values examples

Your Mission and Vision should be relevant to every customer group that you engage with and deliver services to

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Mission: "We want every young person to have the same opportunity to fulfil their potential"

Vision: "Helping community groups survive, to help young people thrive"

VALUES	Demonstrate integrity	Commit to inclusion	Be people led	Drive change

MY NAME IS DODDIE FOUNDATION

Mission: "Fund, guide and enable the smartest, most efficient research to expedite the development of new treatments"

Vision: "A world free of MND"

ACE IT

Mission: "We advance the knowledge and connectivity of older people in Edinburgh, through digital coaching and empowerment, to improve wellbeing, independence and promote active involvement in our community"

Vision: "To contribute to a society where everyone enjoys the benefits of digital empowerment and the inequality created by a technological generation gap is minimised"

VALUES	OPEN CULTURE	PERSON CENTRED	PARTNERSHIP	KNOWLEDGEABLE

How Strategy differs from a Business Plan

Strategy setting is painting a picture of the future you would like to achieve

Strategy

- **Qualitative**

- Driven by **external** considerations

- Based on high level, **informed assumptions** around customer needs

- Provides a "**framework**" for business planning

Business Plan

- **Quantitative**

- Driven by **internal** considerations

- **Detailed** plans and financial forecasts

If you don't have a Strategy and only focus on business plans, you will **only deliver incremental change** as you will be primarily driven by internal considerations

Strategy Planning

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Strategic Planning – Content

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Strategy Planning

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Development Stages

It takes time to develop a strategy (at minimum 3 months).

Strategy typically considers a time horizon of 3 – 5 years, but it depends on the stability of your environment

Strategy Planning

Developing a **Strategy** involves a number of stages:

Engagement

You need to involve people from across your organisation including trustees, staff, volunteers and potentially customers.

They all have different perspectives and value to add

Set/Review your Mission, Vision and Values

Evaluate where you are now and what could happen in your environment

Identify your future goals and objectives

Develop an action plan and communicate the strategy

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Where are you now and what could change

During this stage you have to be forward looking and make informed assumptions based on evidence and trends

This is the stage where the real work is done.

Understanding your Customers

Who are you customers, what are the needs of your customers and how are these changing (as discussed on next slide)

Analysing your "competitive" position

Undertake a SWOT analysis (to be discussed on later slide)

Strategy Planning

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Understanding your customers

Understanding your customers and their needs is the most important aspect of developing your strategy.

You can have different strategic objectives for different customer groups

Strategy Planning

Customer Group Profiling

- What are the **characteristics** of the customers in that group (e.g. age, location, income)?

- What is the **size** of the group and is that changing (up or down)? What's driving that change?

- What are the **needs** of the customers in that group? Are these needs changing and, if they are, why?

- What **barriers** exist that might prevent them from accessing your services (e.g. language, mobility)?

- If you support this customer group already, **how do these customers find** your services?

Ideally, external data will exist about these customer groups that will help to assess some of these questions

Give each group a name that is descriptive of that group

Test your strategy ideas against each group

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SWOT Analysis

For EACH customer group, a SWOT analysis should be produced considering relevant internal and external factors that impact on your "competitive" position:

- **Internal: Strengths and Weaknesses**
- **External: Opportunities and Threats**

Strategy Planning

	Helpful	**Harmful**
Internal Source	**STRENGTHS** Things about your organisation that give you an **advantage** over others	**WEAKNESSES** Things about your organisation that **disadvantage** you compared to others
External Source	**OPPORTUNITES** Things within your **environment** that you could take advantage of	**THREATS** Things within your **environment** that could create difficulties for you

Undertaking a SWOT requires you to have views about "competitors" (alternatives that your customers might choose) both now and in the future

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Goal and Objective Setting

Example below taken from Sported strategy

- Think about what you want to achieve in the period – e.g. stability, growth.
- Different strategies and goals can be defined for different customer groups
- Objectives should ideally be time-bound and specific e.g. have established a girls' football group by 2025
- Consider how you will monitor/measure progress toward each goal e.g. outcome measures, performance indicators

| OBJECTIVES | Improve **mental health** and **physical wellbeing** | Tackle **inequalities** both in sport and through sport | Connect **community** sport groups for **collective action** |

| STRATEGIES | Strategy 1: What we'll do **FOR** our network:
Strengthen the local workforce and build the resilience of community sports groups | Strategy 2: How we'll work **THROUGH** our network:
Design and deliver **targeted programmes** |

Strategy Planning

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Your Action Plan

The Action Plan explains how you are going to make your strategy a reality. This is in effect a roadmap of the journey you are embarking on

The Plan must be REALISTIC!

Strategy Planning

Prioritisation

The initial step is to prioritise the various objectives you have set

Each Action should:

- Be linked to one of your strategic objectives
- Have a clear description of what needs to be done and the outcomes/outputs to be delivered
- Have a defined owner
- Have a timeline for when this action should be completed
- Detail any resources required to undertake the action

Example actions include undertaking research into demand for a new idea, identifying delivery partners, and identifying relevant funding options

Each action should be linked to one of the strategic objectives

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Strategic Planning – Content

1. **What is a Strategy and how is this different from a Business Plan?**

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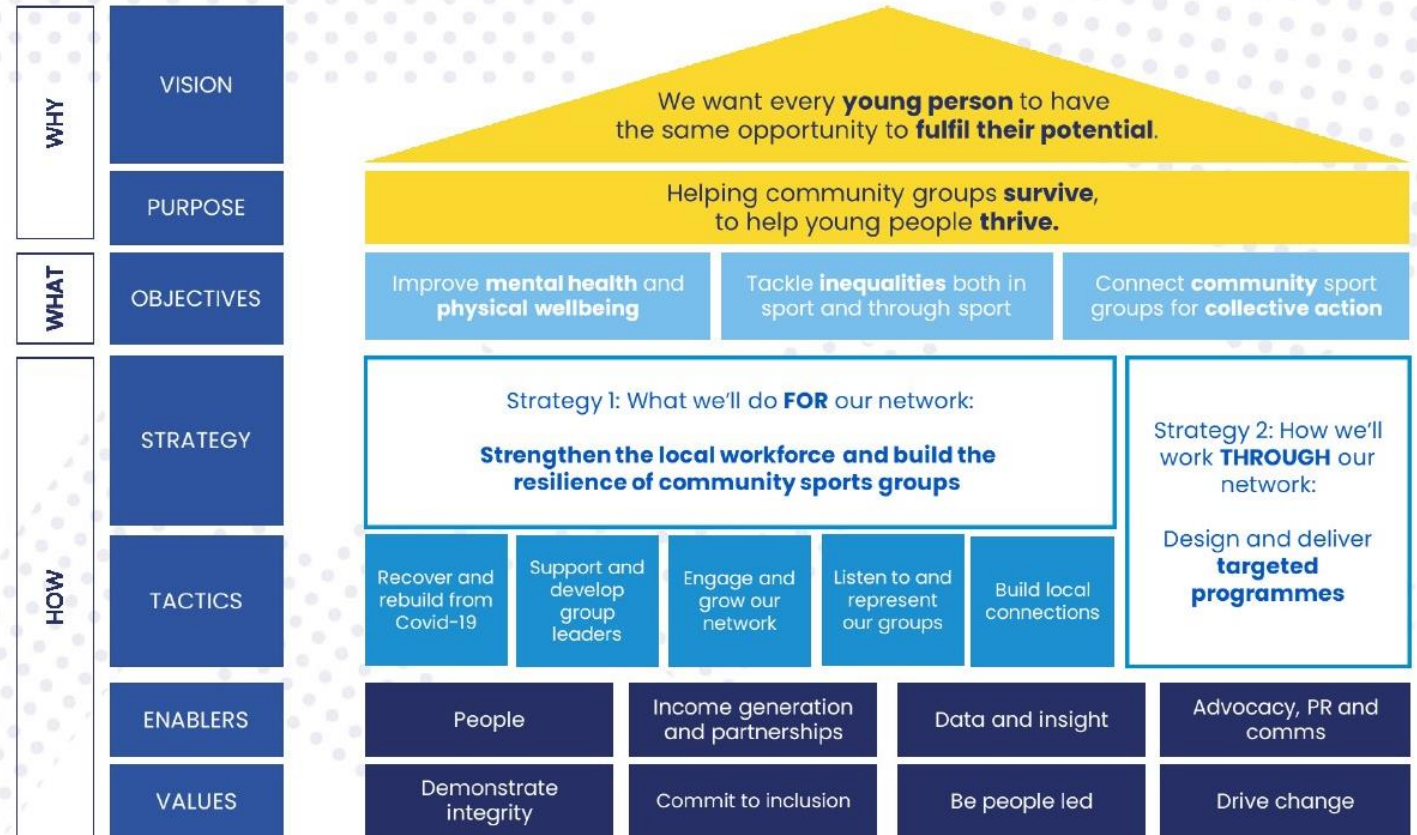
3. **How do I articulate my Strategy?**

Strategy Planning

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Sported

The Sported strategy is presented via the "clubhouse" concept
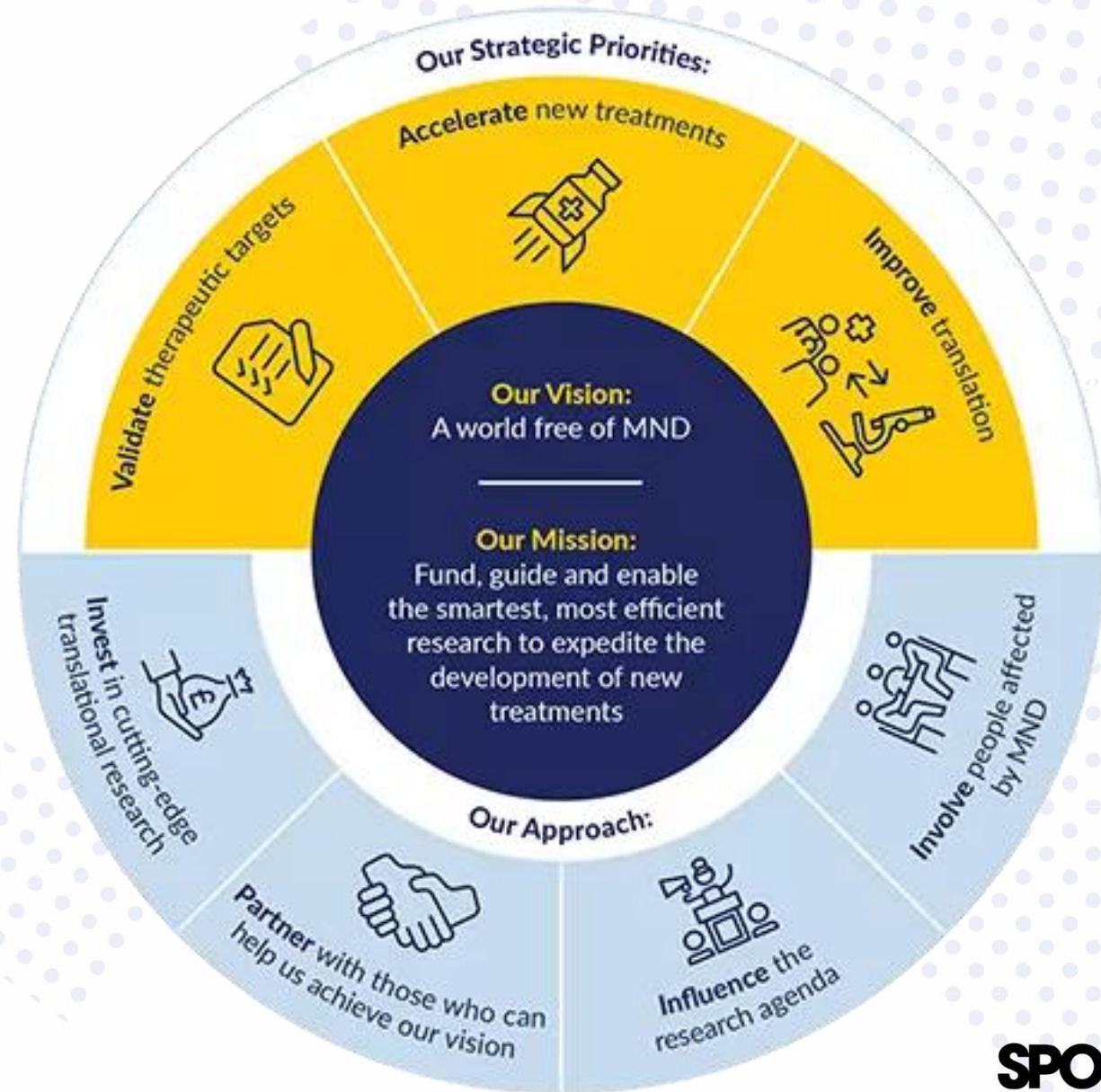
The Clubhouse

Strategy Planning

My Name is Doddie

The "My Name is Doddie" Foundation was setup when Scotland rugby player Doddie Weir was diagnosed with MND

Research Strategy: Advancing MND Knowledge | MN5D Foundation (myname5doddie.co.uk)
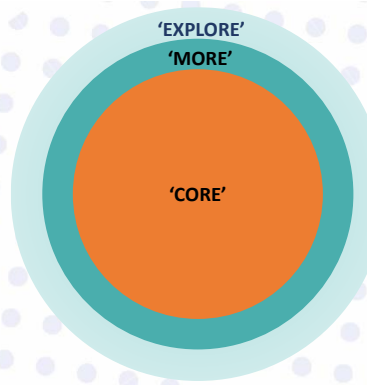
Strategy Planning

ACE IT

ACE IT is a small Edinburgh based charity that helps older people learn digital skills.

[About ACE IT Scotland – ACE IT Scotland](#)

Strategy Planning

'EXPLORE'
'MORE'
'CORE'

Mission	We exist to advance the knowledge and connectivity of older people in Edinburgh, through digital coaching and empowerment, to improve wellbeing, independence and promote active involvement in our community.
Vision	ACE IT will be contributing to a society where everyone enjoys the benefits of digital empowerment and the inequality created by a technological generation gap is minimised.
Values	• Open culture • Person-centred • Partnership-working • Knowledgeable:
Strategic Priorities	Our ambitions for 2026 mean significant development: delivering our core services, expanding to do even more, and exploring new transformational opportunities. To do this we will focus strategically on five key areas: 1. Knowing our Learners 2. Service Development 3. Fundraising 4. People Management 5. PR & Communication
Measures of Strategic Success	• *Breadth of reach* • *Diversity of our learner base* • *Stability of funding* • *Size*

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From Vision to Reality

1: Strategy & Vision

2: Making a Business Plan

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Business Planning - Content

1. What does my Business Plan need to do?

2. What should be in my business plan?

Business Plan

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What a Business Plan needs to do

In effect, a business plan details what you will do to implement your defined strategy and the outcomes that will be delivered, in particular financial

A Business Plan should:

- Be clearly linked to your **Strategy**

- Describe the **Operational and Financial Objectives** during the period (the same period as in your strategy)

- Be **balanced** between being **Realistic** and **Ambitious**

- Detail **Targets** against which progress can be monitored and measured

- Consider the **Key Risks** associated with both the predicted operational and financial outcomes, and describe how these might be mitigated

AN OPERATIONAL AND FINANCIAL PLAN

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Objectives

Your Business Plan needs to define objectives (goals) that meet the SMART criteria, as detailed below.

S	**SPECIFIC** (Simple, Sensible, Significant)	What will you achieve? Leave no room for misinterpretation
M	**MEASURABLE** (Meaningful, Motivating)	What information will you use to determine if you have achieved it?
A	**ACHIEVABLE** (Agreed, Attainable)	Are you sure you can do this i.e. is it realistic?
R	**RELEVANT** (Reasonable, Resourced)	Is this aligned to what else you are doing? What difference will achieving this make
T	**TIME-BOUND**	What's the deadline for achieving this?

Business Plan

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Some are hard to Measure!

In my experience, organisations often find it difficult to identify ways to appropriately measure outcomes, in particular where this relates to human behaviour/emotion

When considering how to **measure outcomes**, think about:

- Are there any single measures that are directly related to what the objective aims to achieve? If yes, how easy is it to capture the data to determine this?

- Are there other things that you are doing (or someone else is doing) that could have an impact on the measure?

- In all cases, what is the starting point so that you can track progress against (benchmarking)?

**e.g.
reduce social isolation**

increase confidence in using IT

Business Plan

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Why you might need one

If well produced, a comprehensive business plan presents an organisation in a professional manner, which can be useful with funders and customers

A Business Plan can be used to:

- Demonstrate to **potential funders** that your predicted outcomes are based on solid assumptions and that you have considered the main risks

- Clearly define all of the various **resources** that are required to deliver your services

- Assess a range of **potential scenarios,** and the **feasibility** of new ideas and projects

- Define clear targets to **demonstrate progress** to both internal and external stakeholders, and to trigger action if change is required

- Assess how costs might change over time and the impact this will have on **funding requirements**

Business Plan

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Business Planning - Content

1. **What does my Business Plan need to do?**

2. **What should be in my business plan?**

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Plan Content

The Sported Hub contains a guide and template for Business Plans

This training is broadly aligned but, for example, the template contains information that was covered in the previous Strategy session

[Business planning guide (sported.org.uk)](#)

[Business plan template (sported.org.uk)](#)

Business Plan

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Plan Content Suggestion

I have deliberately used terminology aligned to charities and other third sector organisations e.g. replacing words such as sales, revenue and marketing which I believe are more aligned to the corporate world

Business Plan

Executive Summary	Promotional Plan
Organisational Background	Income Plan
Summary of your Strategy	Financial Summary
Delivery plan (including people and partners)	Risk Assessment

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Delivery Plan

The Delivery Plan is about what services you intend to deliver and how you intend to deliver these

The plan should detail each of the **Services** you intend to offer (and when if they start after the beginning of the plan), and for each:

- **Customer Group** – who will use the service and how many will use it (which may well vary over time)

- **Delivery Model** – do you intend to deliver the service yourself or are elements of the service will be delivered by a third-party partner (in which case name them)

- **People** – how many staff will be required, including details of roles (including any required skills) and any associated costs (e.g. recruitment and training) both for new and existing staff. Consider any specific roles required to overcome customer barriers

- **Premises** – where you intend to deliver the service from

- **Technology** – any specific technology you will require to deliver your services and any third parties that will supply/support these (in particular if not using off-the-shelf applications)

In addition, include an overall organisational chart.

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Promotional Plan

You could have the best services available but unless potential customers know about them then no one will use them

This should be based around responses to questions such as:

- Which **channels** do you intend to use to promote your services?

- How do you intend to utilise **social media**, if appropriate for your customer groups?

- What **third parties** might direct potential customers to your services? how you will establish and maintain these relationships

- How will your promotional material be adapted to overcome any **barriers** that exist with your customer groups ?

- Who is going to be responsible for all of the promotional activity?

In a corporate situation, this would be referred to as a Marketing Plan

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Income Plan

I have specifically pulled Income out as for many charities being able to attract sustainable funding is the major challenge

Some funders also look for evidence of "matching funding" so this is very important

Business Plan

The plan should describe which income sources will provide the funds you require e.g.:

- **Restricted Grant Funding** – which funders have you identified that provide funding for the type of services you offer, what funding levels do they offer, and how long will they fund for. If you have successful experience of being awarded funding from a funder then detail this, together with any view on repeat funding

- **Activity Fees/Donations** – details of income you expect to be generated from activities

- **Member Fees/Donations** – details of income you expect to be generated from regular payments from members

- **Other Donations and Unrestricted awards** – perhaps based on your experience to date

- **Gift Aid** – do you intend to claim this (only applicable on donations but could provide a 25% uplift on these) Gift Aid – GOV.UK (www.gov.uk)

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Financial Plan

The financial projections should cover the entire period of the plan; modelled on a monthly or quarterly basis.

This projection should detail:

- The key assumptions behind the projection (e.g. customer numbers)

- The various income flows – where you have restricted grant funding you should show how this is used over time

- The main cost categories

- The annual surplus/deficit (aligned to your financial years) – BUT this can create some presentation challenges (see next slide)

- The cashflow position over time – split between restricted and unrestricted funds

The Financial Plan brings everything together to demonstrate the financial outcomes you project that you will deliver.

If you are a charity and operate with a Reserves Policy, you will need to consider this as part of the projected cash flow

Business Plan

How the financial plan is presented makes a huge difference

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Financial Plan Presentation

Use diagrams if easy to understand, or present numbers within easy-to-read tables. Avoid "spurious" accuracy in presented numbers.

Income & Expenditure Summary
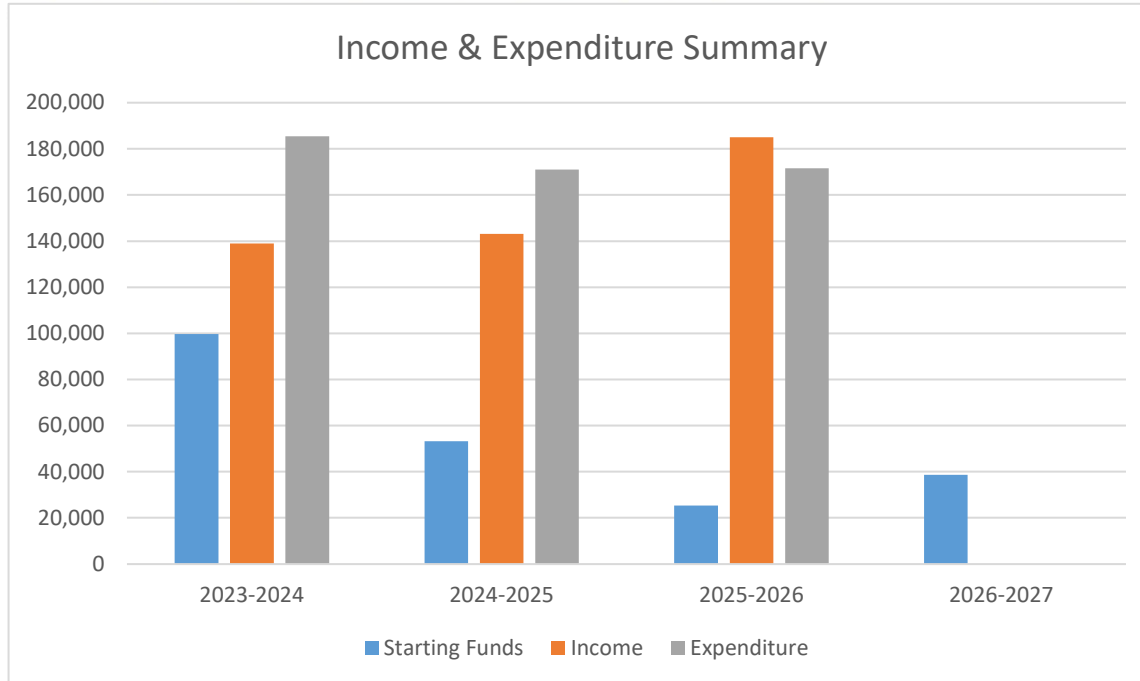
INCOME & EXPENDITURE SUMMARY			
Year	Starting Funds	Income	Expenditure
2023-2024	99,658	138,992	185,401
2024-2025	53,249	143,092	171,058
2025-2026	25,283	185,000	171,630
2026-2027	38,653		

FINANCIAL OUTCOME	
Year	Surplus/Deficit
2023-2024	-46,409
2024-2025	-27,966
2025-2026	13,370

The starting funds position for 2023-2024 included £57,733 of restricted funds to cover costs to be incurred during 2023-2024

Business Plan

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Risk Assessment

You need to consider events that might arise and prevent you from delivering as forecast e.g. lack of funding, new competitors, another pandemic........

In my experience, this is best done through workshop sessions with the people that know your operation, where you should consider the following questions:

- What are the major **risks** that could prevent you from delivering as predicted?

- What would the **impact** of this risk be on your operation?

- What's the **probability** (likelihood) of this risk occurring?

- What pro-active steps could you take to **mitigate** the risk, to reduce either the impact or probability, or both?

- What is the **residual** risk?

A Risk Register is the best way of capturing and assessing these risks

Business Plan

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Risk Register

Extract from Risk Register of small charity where I am a Trustee.

			RISK DETAILS		ORIGINAL ASSESSMENT		
#	Category	Owner	Description	What this could look like	Impact (1-5)	Probability (1-5)	Overall
1	Financial	Trustee Board	Insufficient grant funding	Unable to attract sufficient funding for charity to continue as at present, leading to reduction in what we offer or closure	5	4	Medium/High

	MITIGATED ASSESSMENT		
Mitigating Actions	Impact (1-5)	Probability (1-5)	Overall
Consider all potential grant funders and ideally attract multi-year grants to provide a sustainable model. Alternatives could include significant fee increases for the PWS but this is not viable	5	3	Medium

Use **CATEGORIES** that mean something to your organisation.

In this example these were Financial, Governance, Operational, Reputational and Safeguarding

This example uses a scale of 1 to 5 to assess both **IMPACT** and **PROBABILITY**. **Overall** score in this case is a multiplication of the two.

Sometimes 1 to 3 is just as useful, depends on how much differentiation you want between each risk

Business Plan

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Typical Pitfalls

First impressions are vital – too often business plans contain obvious errors (grammatical or numerical)

Business Plan

- Grammatical errors, including spelling – these simply annoy the reader and (to me anyway) simply leads to them looking for more errors!

- Confusing language, in particular terminology that might not be understood by the reader

- Assumptions that are not clearly explained or lack credibility

- Numbers that don't stack up or have errors

- Insufficient coverage of the risk assessment or the assumed impact and probability don't appear credible

Hints

Be concise

Short sentences, with bullet points

No undefined TLAs

Diagrams (that can be understood)

Details can be in Appendices

Review and proof reading

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From Vision to Reality

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Project Planning – Content

1. Why is planning important and where does it sit within my overall project?

2. How should I initiate a project?

3. How should I plan my project?

Project Planning

Importance of Project Planning

Project Planning includes everything you have to do to <u>maximise</u> the chance that your project is a success.

Although, even with good planning, some projects will still fail

Project Planning

Project planning establish the steps required to:

- define your project objectives and what you aim to deliver
- clarify the scope of what needs to be done (and what doesn't!)
- define the project structure and reporting
- develop the schedule of tasks (including resources)
- assess risks

Project Planning is a Process

"Multiple failings have led to delays and cost overruns" – Audit Scotland Report

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A Project Lifecycle

A project can be described as having 4 main phases as shown below.
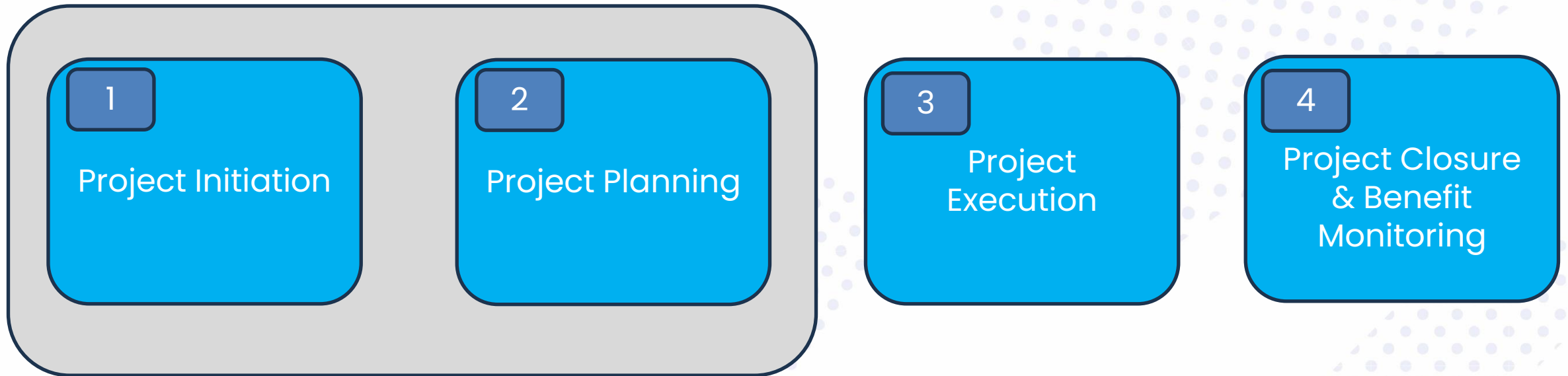
1	2	3	4
Project Initiation	Project Planning	Project Execution	Project Closure & Benefit Monitoring

Project Planning

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Project Planning - Content

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Project Planning

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Project Initiation

A project charter or a project initiation document (PID) should be produced before the project starts that defines the project and what it aims to deliver – in effect this is pre-planning

Objectives & Success Criteria

Outcomes to be measured

Scope

Assumptions

Governance (including change management)

Budget & Expected Timeline

In the next couple of slides we will explore some of these based on a real-life example of implementing a new website for a charity

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Project Initiation

Objective & Success Criteria

- Reason for project – contract with existing website provider ends at end May 2023 and more cost effective to move to in-house solution
- Constraint – new website must be in place by 1 June, as existing solution will not work from then
- **Objective – Develop and implement a new website (at least replicating current functionality) by 31 May 2023**

Project Planning

Scope

- Given time constraint, scope control is crucial
- Scope includes integrating with current CRM system to create requests for sessions from new customers (using a standard interface)
- No new website functionality included at this stage as this could create a risk to delivery, although all existing web pages would be reviewed and updated where necessary
- Also requires new "look and feel" to be defined and consistently used across the website

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Project Initiation

Governance

- Existing business manager to act as Project Manager

- Project Steering Group to be setup with weekly meetings to monitor progress, address issues and consider change requests

- Progress to be reported to Trustee board as part of regular reporting

Outcomes to be Measured

- Website functionality – **all required pages** have content that has been signed-off

- User experience – website is able to support 20 concurrent users and the page refresh time is less than 2 seconds (*numbers here are simply examples*)

- Integration - website allows customers to submit requests for sessions, with **all information** being passed into the CRM system

Project Planning

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Project Planning – Content

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Project Planning

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Project Planning Aspects

Project planning involves many aspects – we are going to discuss the 5 shown here

Project Planning

- Structure & Governance
- Reporting & Communication
- Project Schedule
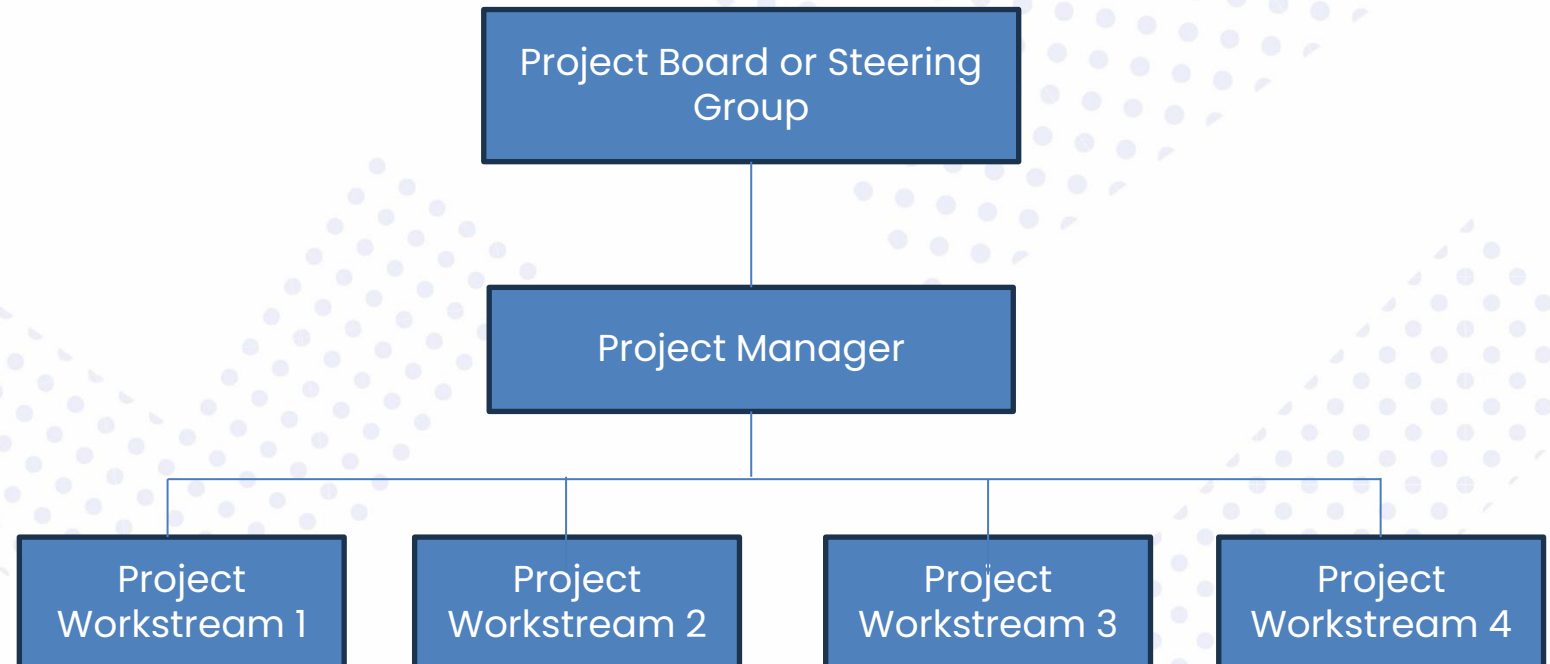- RAID Log
- Testing & Acceptance

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Project Structure & Governance

There is no "one-size-fits-all" option. Choose the structure that is most appropriate to the scale and complexity of your project.

**Also need to consider who the stakeholders are and what they want to know and when**

Project Planning

- Project Board (or Steering Group) is the senior governance body for the project. For large projects, this may have sub-groups – need to define responsibilities of each of these
- Establish workstreams for each set of activities that naturally sit together – each workstream should have a workstream lead who will report on progress to the project manager

```
Project Board or Steering Group
            |
      Project Manager
            |
  ┌─────┬─────┬─────┐
Project   Project   Project   Project
Workstream 1  Workstream 2  Workstream 3  Workstream 4
```

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Project Structure & Governance

For the "new website" example project, the project structure could have been setup as shown below, with the steering group being responsible for reviewing and approving change requests.
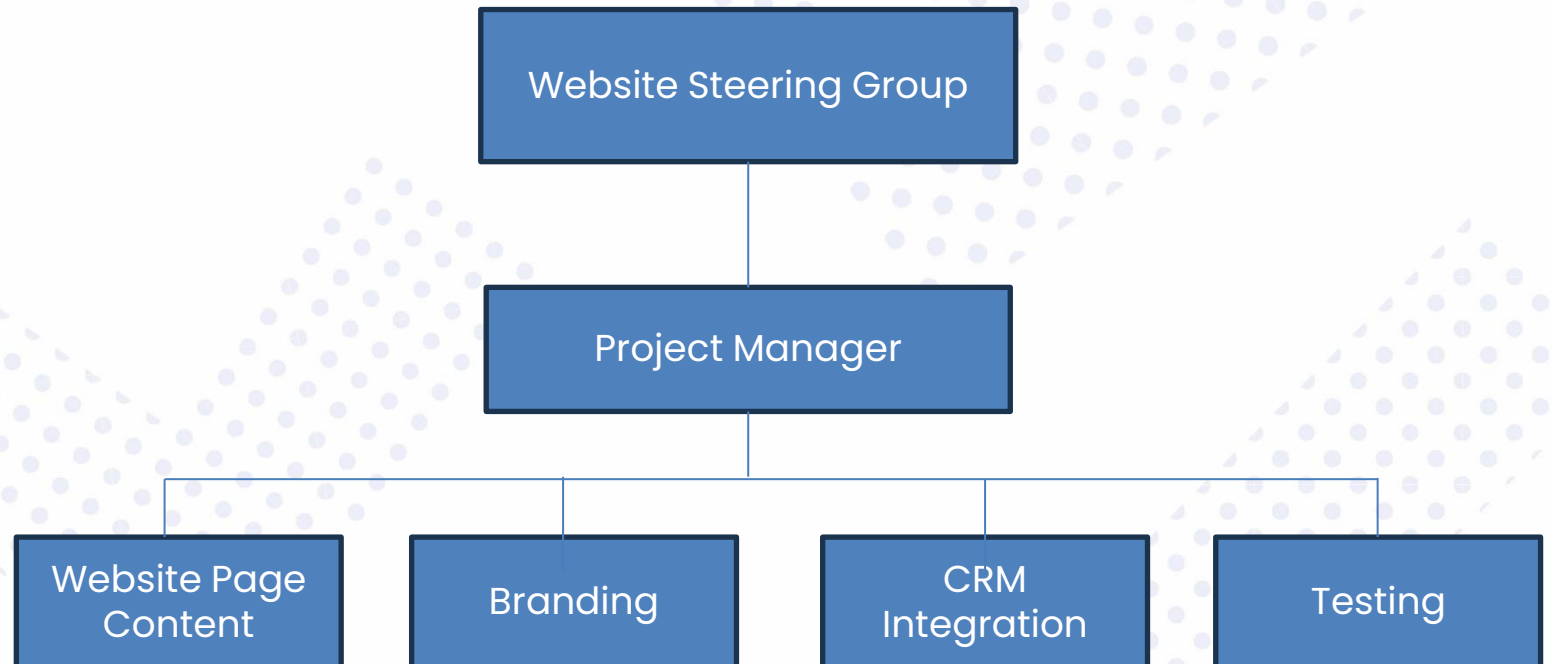
Project Planning

Project Reporting & Communication

Good communication and regular reporting are the keys to project success, as everyone is kept up to date, and there should be no "surprises" – project managers hate surprises!

The project manager should be at the centre of all of this activity which typically will include:

- Workstream leads producing weekly update reports and submitting these to the project manager

- The project manager holding weekly meetings with all workstream leads to review progress and issues

- The project manager producing regular update for the Steering Group (frequency aligned to how often the steering group meets) highlighting overall progress and clearly identifying where the steering group needs to take decisions

- Potential change requests being raised with the project manager, who will ensure that appropriate impact analysis is undertaken, together with a review of options

- The project manager will include completed change requests as part of the documentation submitted to the steering group

- Regular progress updates will be issued to all identified stakeholder groups

Project Planning

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Project Schedule

Often referred to as the "project plan", the schedule captures all of the tasks and activities that must be undertaken as part of the project

The Schedule needs to include ALL tasks to be undertaken, typically broken down into sections for each project workstream. For each task capture:

- Description of the task
- The deliverables from that task (this helps to avoid ambiguity about what sits where in the project)
- The planned start and end dates of the task
- The people who are responsible for delivering the task
- Any dependencies that the task has on other tasks (really important as you move into the execution phase)

Projects may be broken down into phases, with the deliverable(s) from each phase being referred to as a **Milestone**. Can be useful where projects are complex or run for a significant period of time.

The initial plan should be "**baselined**" so that any changes against the plan can be understood and monitored.

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Project Schedule

Project Schedules can be very simple – normally no need to invest in specific software products and simply use tools like spreadsheets

Project Planning

SIMPLE PROJECT PLAN TEMPLATE

PROJECT NAME					PROJECT MANAGER		
PROJECT DELIVERABLE							
SCOPE STATEMENT							
START DATE	00/00/0000		END DATE	00/00/0000	OVERALL PROGRESS		0%

AT RISK	TASK NAME	ASSIGNED TO	START DATE	END DATE	DURATION in days	STATUS

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Project Schedule – example

Simplified example based on the new website project described earlier – dependencies allow you to identify the **Critical Path** for the project (1 – 3 and 4 – 5)

		Task Information					Baseline Plan	
Task ID	Description	Workstream	Deliverables	Owner	Other Resources		Start Date	End Date
1	Review all existing website content	Site Content	Wording changes identified	CB	AZ, CT		13-Feb	31-Mar
2	Develop new website branding	Site Content	Brand template	AS			13-Feb	24-Feb
3	Create new website pages	Site Content	Website pages	CB	AZ, CT		03-Apr	12-May
4	Develop interface with CRM system	CRM Integration	Working interface	PZ	External IT		17-Apr	12-May
5	Test website functionality and performance	Testing	Tested website	CB	AZ, CT, AS, Board		15-May	26-May

In this case, completion of 3 and 4 could be viewed as being milestones

	Dependencies		Progress			
			Current Plan			
Task ID	On other Tasks	Of other Tasks	Start Date	End Date	% Complete	Comments
1	-	3				
2	-	3				
3	1,2	5				
4	-	5				
5	3,4	-				

Project Planning

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RAID Log

A RAID Log is a project management tool that helps to pro-actively consider things that might go wrong and how to manage these situations, in addition to recording what happened when issues did arise

R	**RISKS**	The problems that might arise, how likely these are to occur and what would the impact be, how these might be mitigated
A	**ACTIONS**	Record of all actions being taken, with allocated owners and target dates
I	**ISSUES**	The actual issues that have arisen during the project, action being taken to resolve these, and the current status
D	**DECISIONS**	List all decisions that need to be taken during the project

Project Planning

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Risk Assessment

Every project faces potential risks that will impact on the project itself or the outcomes that the projects aims to deliver. Good risk management is at the heart of good project management

Project Planning

As before, I believe that populating the risk section is best done through workshop sessions with the people involved in the project, where you should consider the following questions:

- What are the major **risks** that could prevent your project from delivering as predicted (time, cost and outcomes)?

- What would the **impact** of this risk be on your project?

- What's the **probability** (likelihood) of this risk occurring?

- What pro-active steps could you take to **mitigate** the risk, to reduce either the impact or probability, or both?

- What is the **residual** risk?

You should also assign an OWNER to each risk, who monitors the risk

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Testing & Acceptance

Testing can be tricky, in particular if elements of the project combine to deliver the outcome. Good planning involves considering how you can test at each stage and what level of quality is acceptable

You can have the best project plans, delivered everything to time, but unless what you deliver is properly tested, you might deliver something that is of poor quality and fails to meet objectives. You need to plan what and how you will test as part of project planning:

- What different project deliverables will need to be tested, both in isolation and combined with others ("integration" or "end-to-end" testing)?

- What "test" facilities will you have access to? If you need to test "live" could this be done without impacting on customers?

- Who will do each testing activity, including preparation of test scenarios and expected results?

- Do you want to involve some "customers" in testing and, if yes, how?

- What level of quality must be met before you are happy to implement (typically involves specifying the level of defects you would accept)?

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Typical Pitfalls

Many projects fail to meet the agreed timescale and cost and/or fail to deliver the hoped for outcome – good planning can help to avoid most of these situations

Things that go wrong during and after projects include:

- Scope changes lead to delays and more cost

- Dependencies between tasks(including other projects) not well understood

- Poor acceptance testing leads to poor quality of deliverables and need for remedial action

- Slow decision-making leads to delays

- Insufficient consideration of potential risks

How good planning helps to avoid these:

- Adopt a robust change control process

- Detail all dependencies within the project schedule and monitor these

- Plan the testing you will undertake and what level of defects you will accept

- Define an appropriate governance structure

- Develop a RAID log and assign risk owners

Project Planning

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From Vision to Reality

1: Strategy & Vision

2: Making a Business Plan

3: Practical Project Planning

1. Communicate

2. Being SMART

3. Being Customer Centric

4. Manage Risk/Change

5. Measuring the Outcomes

From Vision to Reality

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