

PROJECT PLANNING PROCESS

From Vision to Value — Plan Smart. Execute Better.

"A goal without a plan is just a wish." — Antoine de Saint-Exupéry

PROCESS PHASES OVERVIEW

1. Initiate	2. Define Scope	3. Develop Plan	4. Align & Approve	5. Prepare Execution	6. Execute	7. Monitor & Control	8. Close
- Identify need - Define objectives - Assess feasibility - Identify stakeholders	- Gather requirements - Set boundaries - Identify deliverables - Define success criteria	- Create WBS - Plan schedule - Estimate resources - Plan budget - Identify risks	- Review stakeholders - Refine plan - Gain approvals - Set baseline	- Assemble team - Procure resources - Set up tools - Conduct kick-off	- Implement plan - Manage resources - Track progress - Ensure quality	- Track performance - Manage changes - Mitigate risks - Ensure compliance	- Verify deliverables - Capture lessons - Release resources - Celebrate success

PROJECT PLANNING PROCESS TABLE

#	Phase	Key Activities	Deliverables	Responsible	Duration	Key Tools & Techniques	Success Criteria
1	Initiate	Identify need, set objectives, assess feasibility, identify stakeholders	Project charter	Project Sponsor	1-2 weeks	Business case, SWOT analysis	Approval to proceed
2	Define Scope	Gather requirements, set boundaries, identify deliverables, define success criteria	Scope statement	Project Manager	2-3 weeks	Interviews, Workshops, MoSCoW, User stories	Clear and agreed scope
3	Develop Plan	Create WBS, plan schedule, estimate resources, plan budget, identify risks, define communication plan	Project management plan	Project Manager	3-4 weeks	WBS, Gantt chart, RACI, Risk matrix, Cost estimation	Comprehensive plan with stakeholder buy-in
4	Align & Approve	Review with stakeholders, refine plan, gain approvals, set baseline	Approved project plan	Steering Committee	1-2 weeks	Review meetings, Sign-off	Formal approval & baseline set
5	Prepare Execution	Assemble team, procure resources, set up tools, conduct kick-off	Ready team & infrastructure	Project Manager	1-2 weeks	Resource planning, Procurement, Kick-off meeting	Team ready & aligned
6	Execute	Implement plan, manage resources, track progress, ensure quality, communicate status	Project deliverables	Project Team	Varies	Agile/Scrum, Kanban, Collaboration tools	Deliverables completed as planned

7	Monitor & Control	Track performance, manage changes, mitigate risks, ensure compliance, report status	Performance reports	Project Manager	Ongoing	KPIs, Earned Value Management, Change control board	Project on track, risks managed
8	Close	Verify deliverables, capture lessons learned, release resources, celebrate success	Final report (Lessons learned)	Project Manager	1-2 weeks	Post-project review, Surveys	Formal closure & value realized

KEY SUCCESS FACTORS & TIMELINE

KEY SUCCESS FACTORS

Key Success Factor	Description
Clear Objectives	A goal without a plan is just a wish; objectives must be specific and aligned.
Engaged Stakeholders	Ensuring regular communication and alignment across teams and steering committees.
Realistic Planning	Accurate estimates for task durations, resources, and budgets to avoid overruns.
Continuous Monitoring	Using performance indicators and change controls to keep execution on track.
Adaptive Mindset	Being ready to manage risks and adjust to changing delivery variables smoothly.

PROJECT PLANNING TIMELINE (EXAMPLE)

Phase	Month 1	Month 2	Month 3	Month 4	Month 5
Initiate	■■■■■				
Define Scope	■■■■■				
Develop Plan		■■■■■■■			
Align & Approve		■■			
Prepare Execution			■■		
Execute			■■■■■■■	■■■■■■■■■	
Monitor & Control			■■■■■■■	■■■■■■■■■	■■■■■■■■■
Close					■■■■■