



# Playbook

*Helping the best minds accelerate the delivery of world changing products!*

**Keys to Success**

# Playbook Maturity - Level 1

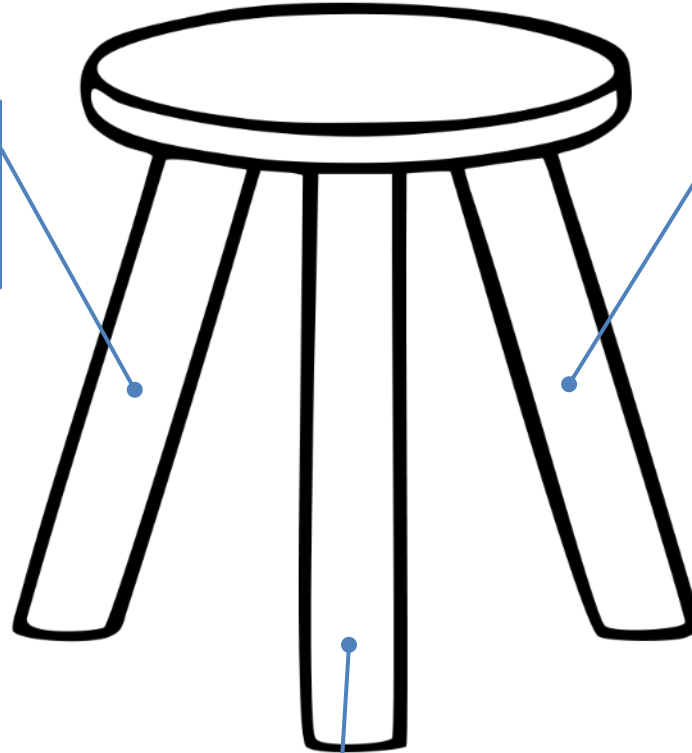
	Team Members	Project Managers
Goal	Correct Priorities Daily	Correct Critical Path
Owns	Plan Details Daily Task Updates	Decentralized Planning  Huddles  Buffers  Rolling Wave Planning
Performance Measures	Out of Date Tasks	Out of Date Plans
What You'll Notice	No Multitasking	Empowered Teams

# Level 1 – Keys to Success

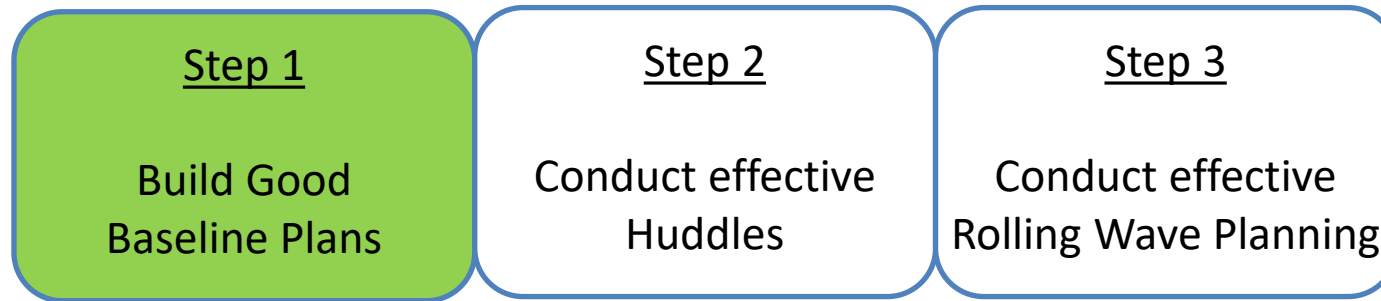
Build good baseline plans

Conductive effective, regular  
Rolling Wave Planning sessions

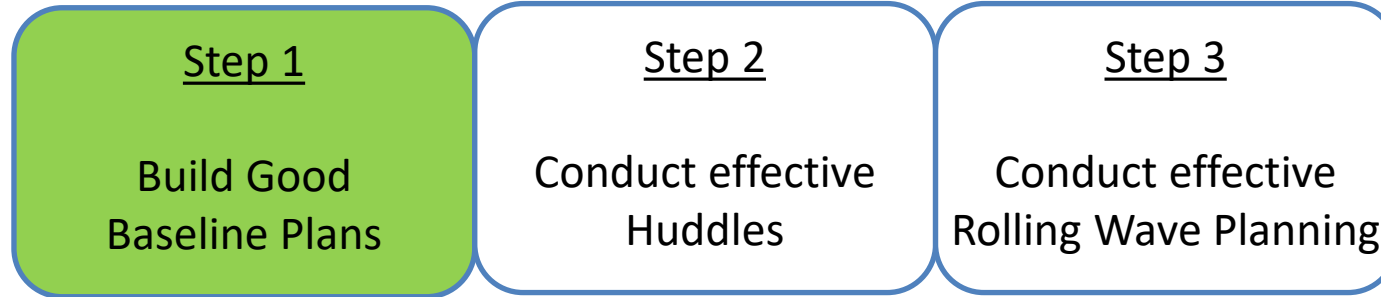
Conduct effective, regular Huddles



# Playbook Ceremonies

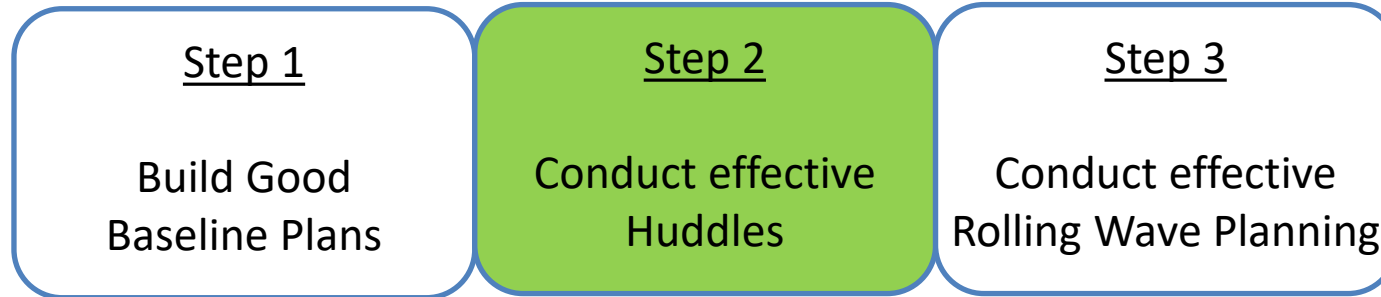


# Level 1 – Build Good Plans



<b>Owner</b>	Project Managers and Summary Task Owners
<b>Participants</b>	PMs and STOs lead collaborative planning sessions with the Team Members who will be doing the work.
<b>Why</b>	Create a plan that is as accurate as possible, <i>so everyone's priorities are correct.</i>
<b>When</b>	At the beginning of a project and phase.
<b>How Long</b>	60-90 min/session until the plan is complete to the next major milestone.

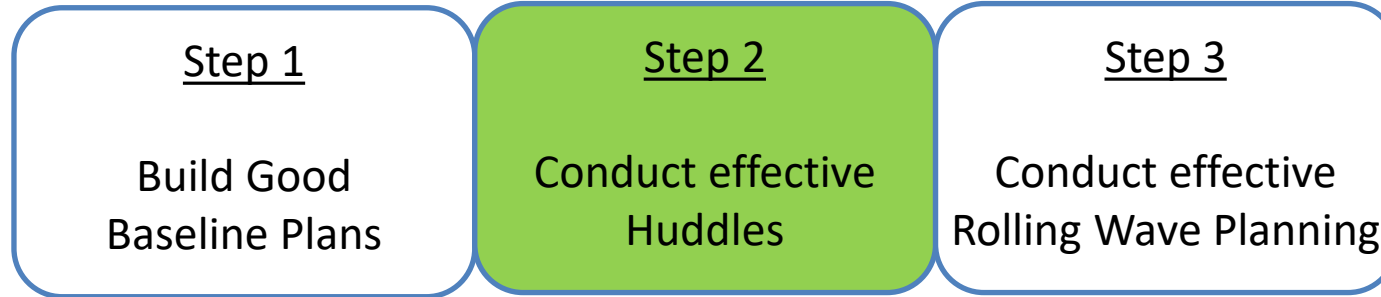
# Level 1 – Conduct Effective Huddles



<b>Owner</b>	Project Managers & Team Captains
<b>Participants</b>	Team Members
<b>Why</b>	<i>To ensure the critical resources are not blocked and get them help if they are.</i>
<b>When</b>	3-5 days/week
<b>How Long</b>	≤15 minutes/project

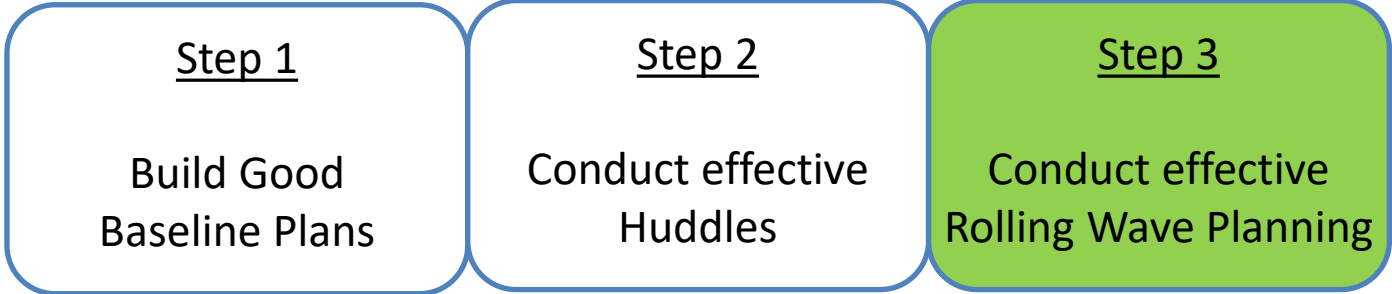
# Level 1 – Conduct Effective Huddles

## Keep Active Tasks Up-to-Date



<b>Participants</b>	Everyone
<b>Why</b>	To ensure everyone's priorities are <b>correct</b> . No one has to ask you the status of your work. To prepare for the next huddle.
<b>When</b>	At the end of every day
<b>How Long</b>	≤5 minutes/day. (Really!)

# Level 1 – Conduct Effective Rolling Wave Planning

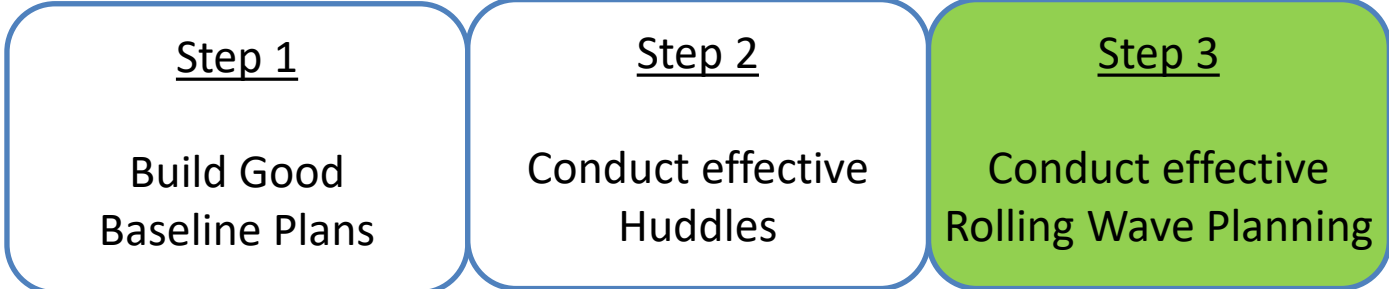


Rolling Wave Planning Meeting	
Owner	Project Manager
Participants	PM, Team Captains, Core Team Members
Why	Optimize the near-term plan, assess timeline health, and strategize how to reach milestones earlier.
When	Bi-Weekly
How Long	30 minutes/week



# Level 1 – Conduct Effective Rolling Wave Planning

## Keep Plans Up-to-Date



Rolling Wave Planning Preparation	
<b>Owner</b>	Project Managers and Summary Task Owners
<b>Participants</b>	PM, Team Captains, Core Team Members
<b>Why</b>	Keep the near-term plan up to date <i>so the critical path and buffer charts are correct.</i>
<b>When</b>	Weekly
<b>How Long</b>	30 minutes/week

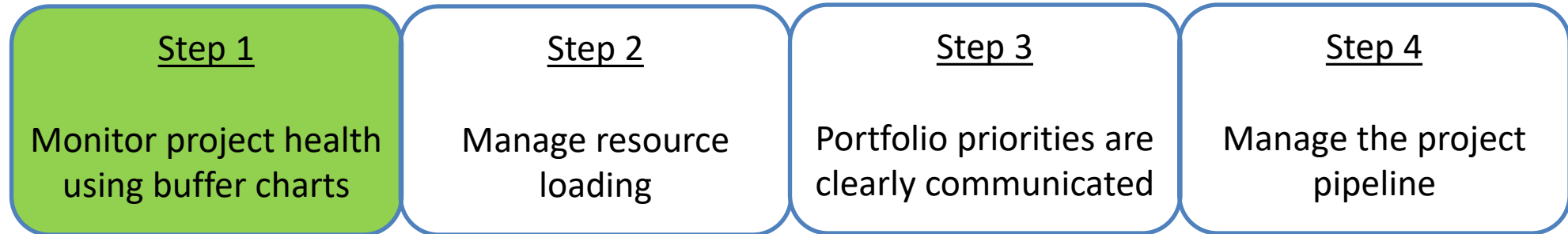
# Level 1 – Scorecard

Process Component	Measures	Current Score 1 = very poor 5 = neutral 10 = very good
Build good plans.	<ul style="list-style-type: none"> <li>• Summary Task Owners are identified.</li> <li>• Planning is performed with the people that will do the work.</li> <li>• Durations are estimated using CCPM (50/50, singletasking).</li> <li>• Buffers and buffer charts are created.</li> </ul>	
Conduct effective huddles	<ul style="list-style-type: none"> <li>• Playbook is used regularly (<math>\leq 15</math> min, 3-5 days/week).</li> <li>• Everyone comes on time and prepared – their tasks are updated in advance (<math>&lt; 5</math> min/day).</li> <li>• Correct huddle protocol is followed.</li> </ul>	
Conduct effective rolling wave planning	<ul style="list-style-type: none"> <li>• STOs prepare in advance of the meeting (<math>\sim 30</math> min/week).</li> <li>• Rolling wave planning meetings are regularly scheduled and conducted, weekly or bi-weekly (60 min/week).</li> <li>• Buffer charts are used to assess project health.</li> </ul>	

# Playbook Maturity - Level 2

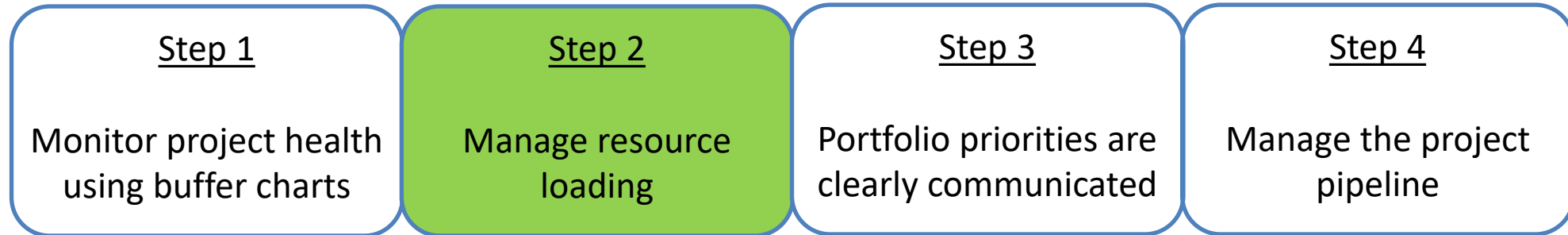
	Team Members	Project Managers	Functional Managers	Leadership
Goal	Correct Priorities Daily	Correct Critical Path	Available Resources	Predictable End Dates
Owns	Plan Details Daily Task Updates	Decentralized Planning Huddles Buffers Rolling Wave Planning	Resource Loading	Project Prioritization Pipeline Management
Performance Measures	Out of Date Tasks	Out of Date Plans	No Critical Resource Conflicts	Hitting End Dates
What You'll Notice	No Multitasking	Empowered Teams	Ability to Respond to Changes	Predictable End Dates

# Level 2 – Monitor Project Health using Buffer Charts



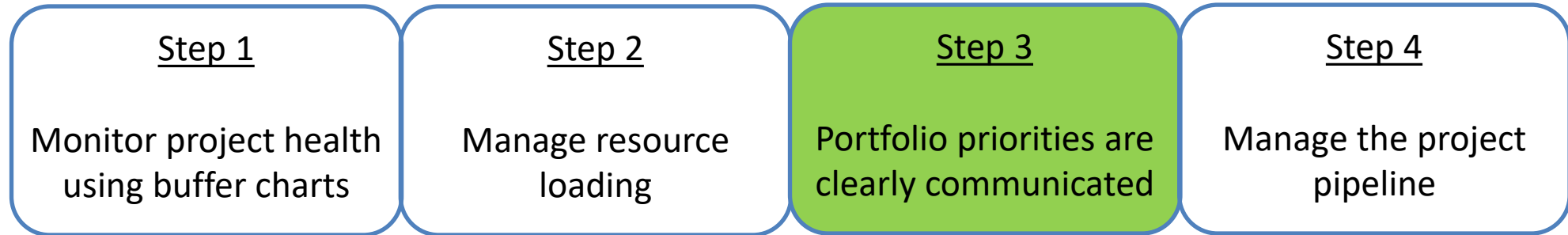
<b>Owner</b>	Project Manager
<b>Why</b>	To see and more effectively manage schedule risk consistently across projects.
<b>When</b>	Weekly
<b>How Long</b>	15 min/week as part of the rolling wave planning meeting

# Level 2 – Manage Resource Loading



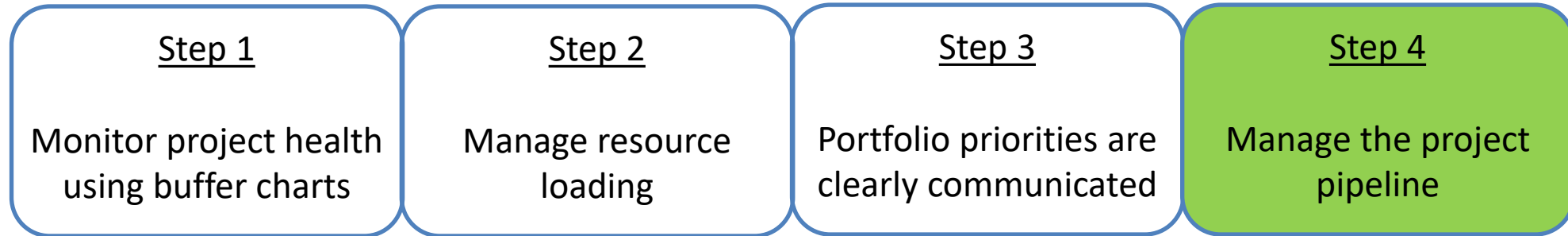
<b>Owner</b>	People Managers	Project Managers
<b>Why</b>	Ensure team members are happy because they are not overloaded. And to get a better understanding of people's availability.	To ensure project timelines are reasonable because there are no critical resource conflicts across projects.
<b>When</b>	Monthly	Weekly
<b>How Long</b>	30 min	30 min

# Level 2 – Portfolio Priorities are Clearly Communicated



<b>Owner</b>	PMO, Senior Management
<b>Why</b>	To ensure people know what the right things to work on right now are, consistently throughout the system.
<b>When</b>	Monthly, Quarterly
<b>How Long</b>	30 min

# Level 2 – Manage the Project Pipeline



<b>Owner</b>	PMO, Senior Management
<b>Why</b>	To ensure projects have adequate resources resulting in higher confidence that timelines will be met.
<b>When</b>	Monthly, Quarterly
<b>How Long</b>	60 min

## Level 2 – Scorecard

Process Component	Measures	Current Score 1 = very poor 5 = neutral 10 = very good
Project health is monitored using buffer charts	<ul style="list-style-type: none"> <li>• Buffer charts are regularly reviewed with the team. (weekly)</li> <li>• Buffer charts are included in standard reports to stakeholders.</li> </ul>	
Resource demand/loading is managed	<ul style="list-style-type: none"> <li>• People are happy because they are not consistently overloaded.</li> <li>• Task durations and project timelines are based on measured resource availability.</li> </ul>	
Portfolio priorities are clearly communicated	<ul style="list-style-type: none"> <li>• People know the portfolio priorities and understand how to use them to prioritize their work.</li> </ul>	
Project pipeline is managed	<ul style="list-style-type: none"> <li>• Projects have adequate resources available at the start of the project and for the foreseeable future.</li> </ul>	