Playbook

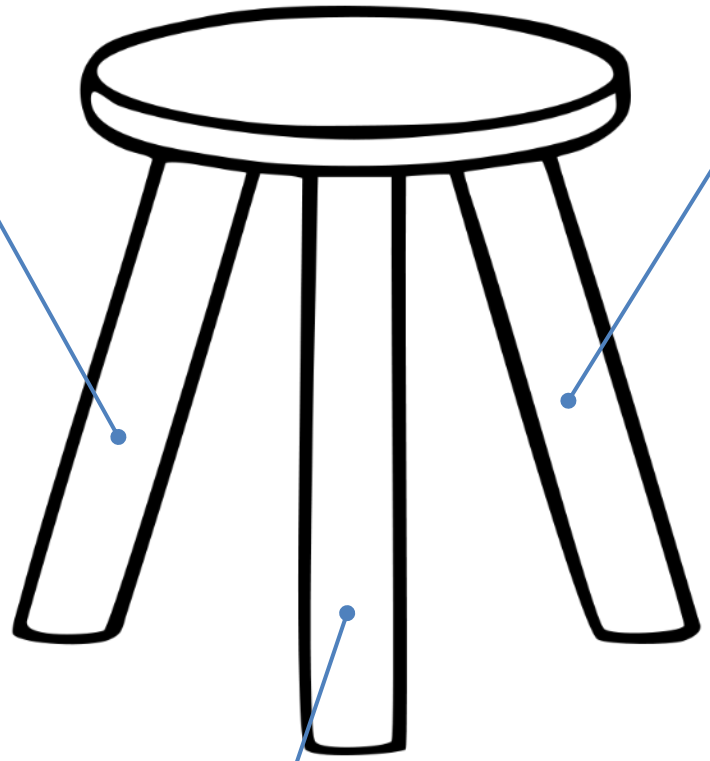
A revolution in how things get done!

Keys to Success
“How to” Guidelines

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Performance Measures	Out of Date Tasks	Out of Date Plans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

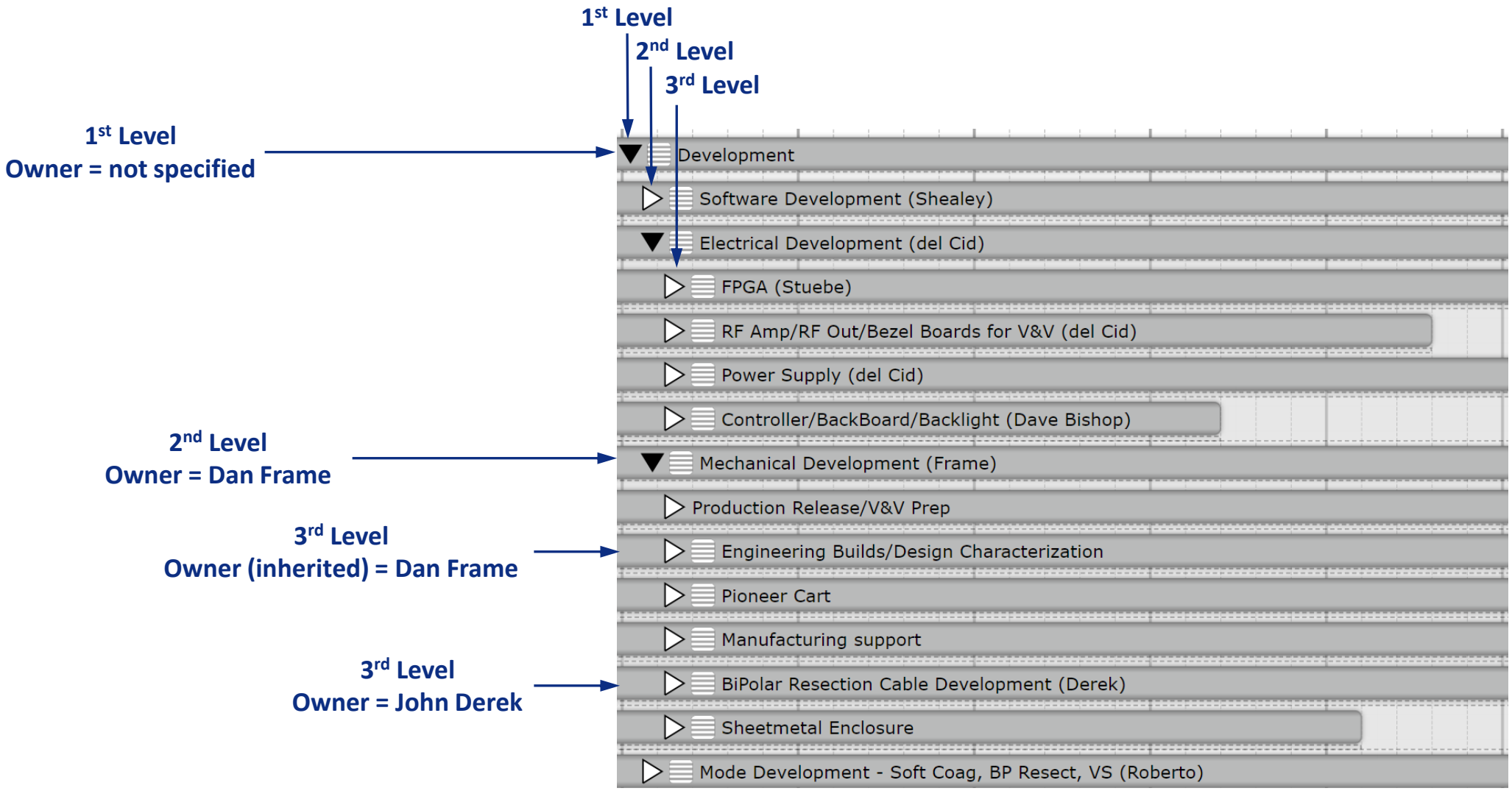
Conductive effective
Rolling Wave Planning

Conduct Effective Huddles

Level 1 – Build Good Plans

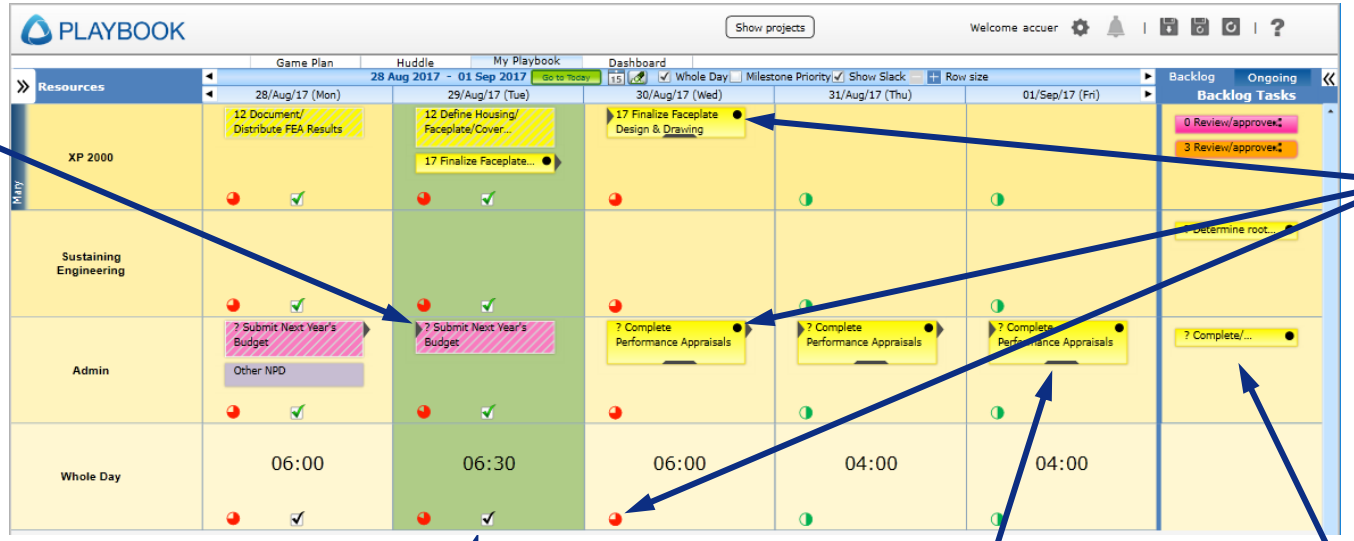
- ❑ Tasks are linked to appropriate predecessors/successors
- ❑ Tasks are linked to a common major milestone, directly or indirectly (slack and criticality are known).
- ❑ Durations are estimated using CCPM philosophies (focused effort, no individual task buffers).
- ❑ Summary tasks are assigned to a single owner (Team Captains) (typed in parentheses after the title). If an owner is not specified, the owner is assumed to be the same as the parent summary task.
- ❑ Task types are used appropriately (Meeting Tasks, Shared Tasks, Off-Project, etc.).
- ❑ Structure is clear with no tasks too deeply buried (typically, not more than three levels) and the plan is easy to navigate and for people to find what they need.
- ❑ The people assigned to the tasks understand the meaning of their tasks. Generally, this requires either a collaborative plan-development/review meeting or 1-on-1 discussions.
- ❑ Resource loading is assessed, and plans/resources are leveled (especially critical and near-critical resources).
- ❑ Major milestones have appropriately sized buffers and the buffer is used to assess project health.
- ❑ Templates are used to save people time building and maintaining workstreams and to keep things consistent for all consumers of the information.

Level 1 – Build Good Plans



Level 1 – Conduct Effective Huddles
Keep Active Tasks Up-to-Date

❑ #1
Accurately reflect the status of your active tasks and how much time was spent.



❑ #2
Schedule tasks for tomorrow to show what you plan to work on making sure you're not overloaded.

❑ #3
Make sure the end dates of active tasks are accurate, including Monitor tasks.

❑ #4
Check the Backlog for tasks that are queued and ready to be started – make sure your priorities are clear and correct.

❑ #5
Check the "Close the Day" box to indicate your tasks are up to date!

Level 1 – Conduct Effective Huddles
Keep Active Tasks Up-to-Date

- Email Notification – Reminder to Close-out the Day and/or if there are Active tasks out-of-date.

The following tasks in the calendar (Huddle/My Playbook) are out of date:
(W01)
To Do: Click on the warning icon in the left column of your row in the Huddle or My Playbook view. Look in the leftmost day for a task which ends that day but has not been marked complete.

Criticality	Priority :Slack	Task Title	End Date	Resource	Project : Summary Task
Critical ?	?	Out of Date Active Task	06/06/19 (3 weekdays ago)	DeLong	Other: None (Top Level)

Level 1 – Conduct Effective Huddles

Playbook

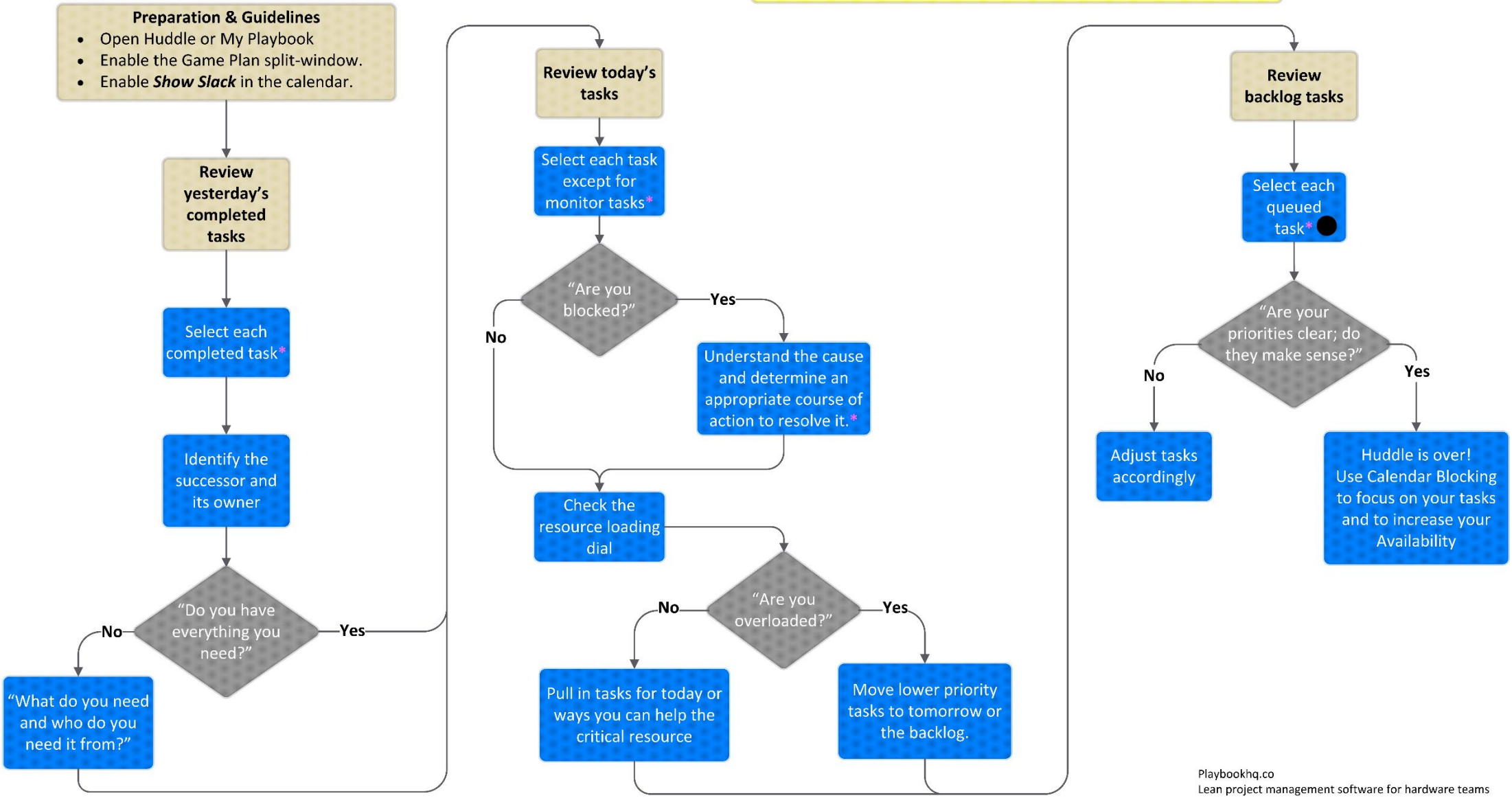
Purpose

1. Manage blockages*
2. Manage queued tasks*
3. Ensure handoffs are smooth*
4. Ensure everyone's priorities are clear and correct
5. Minimize overloading and multitasking

* Especially the critical tasks (pink)

Not the Purpose

1. Not a status meeting - avoid regurgitating the same info day after day (share new relevant info only).
2. Offline in-depth technical conversations.
3. Avoid using "late" (instead ask, "what's causing this to take longer than expected" and find ways to help the team to be successful).
4. Do not make changes (everyone needs to come prepared having made their updates in advance).



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Lean project management software for hardware teams

Level 1 – Conduct Effective Rolling Wave Planning Preparation

For the timeframe, t < 0 (today):

- ❑ Move out-of-date tasks in the plan to the right to when you think they are likely to start (where out-of-date means the task's start date is in the past).

For the timeframe, 0 > t ≤ 8 (weeks):

- ❑ Delete invalid tasks or assign them to the N/A resource to indicate they are no longer applicable.
- ❑ Create tasks, dependencies, and assign resources for new work/effort.
- ❑ Add detail to near-term plans; Work task durations ≤ 3 days (does not apply to Monitor tasks)
- ❑ Review changes/plan with affected resources and make changes as appropriate (improve the plan).
- ❑ Review resource loading and identify overloads (especially for critical and near-critical resources) and be prepared to discuss these with the project manager.
- ❑ Ensure all tasks are assigned to a resource (no unassigned tasks).
- ❑ Ensure slack and criticality are known for all tasks (no brown tasks).

For the timeframe, 8 > t ≤ 16 (weeks):

- ❑ Begin fleshing out placeholder tasks to more detail (outline level).
- ❑ Assign resources and assess resource loading.

Level 1 – Conduct Effective Rolling Wave Planning

Optimize the near-term plan, assess timeline health, and strategize how to reach milestones earlier.

- ❑ Review the past week's progress.
- ❑ Assess project health using the buffer chart. Identify and capture any reasons for delays.
- ❑ (Optional) Review the Timeline report to see 'what changed' in the past week.
- ❑ Assess the critical path for ways to go faster without incurring unnecessary, unacceptable risk.
- ❑ Identify new risks and assign risk owners.
- ❑ Resolve resource overloads (especially for critical and near-critical resources) as needed.

Performance Measures

- Email Notification - Resource Weekly Summary

Department	Name	# OOD in Calendar	max days OOD in Calendar	# OOD in Game Plan	max days OOD in Game Plan	% of Days Logged In	# Created	# Edited	% Closed*	# of Unaccepted Tasks
Industrialisation	Mark Wright					10 %			-	13
Program Mgmt.	Barry Bradley	1	1			50 %		2	0 %	
Program Mgmt.	Craig Mack			2	2	100 %	41	146	90 %	
Technology	Aidan Owens	1	3			50 %	1	26	75 %	24
Technology	Brian Macruagain								-	
Technology	Elm Costa	4	11	6	24	60 %		8	0 %	43
Technology	Lauren Foster	2	1			80 %	5	11	87 %	
Technology	Martin Duffy								-	
Technology	Matthew Bell	1	1			50 %	10	26	50 %	
Technology	Matty McParland			1	19	100 %	3	56	0 %	
Technology	Robert Dunlop								-	

Performance Measures

- Are people closing-out the day and preparing for the next huddle?
  - Out of Date Active Tasks (OOD in the Calendar)

Department	Name	# OOD in Calendar	max days OOD in Calendar	# OOD in Game Plan	max days OOD in Game Plan	% of Days Logged In	# Created	# Edited	% Closed*	# of Unaccepted Tasks
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Performance Measures

- Are people closing-out the day and preparing for the next huddle?
  - Out of Date Active Tasks (OOD in the Calendar)

To Do: Click on the warning icon in the left column of your row in the Huddle or My Playbook view. Look in the leftmost day for a task which ends that day but has not been marked complete.

Criticality	Priority :Slack	Task Title	End Date	Resource	Project : Summary Task
Critical ?	1:0	Iteration 2 - DGA900 Setup - 3 cards	05/17/19 (1 weekdays ago)	Elm C	DGA 900 Models: Detailed Design (EC)
Normal ?	1:30	Draw up revised Layout Configuration schematic	05/15/19 (3 weekdays ago)	Aidan O	BMT 400: Detailed Design (Matty) -> Mechanical Design BMT + Models (Aidan)

Performance Measures

- Is the Rolling Wave Planning process healthy?
  - Out of Date Planned Tasks (OOD in Backlog)

Department	Name	# OOD in Calendar	max days OOD in Calendar	# OOD in Game Plan	max days OOD in Game Plan	% of Days Logged In	# Created	# Edited	% Closed*	# of Unaccepted Tasks
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Technology	Robert Dunlop								-	

Performance Measures

- Is the Rolling Wave Planning process healthy?
  - Out of Date Planned Tasks (OOD in Backlog)

To Do: Click on the following tasks in your backlog. Schedule and/or mark complete those you have started, and drag out the ones you have not started using the Game Plan split-screen.

Criticality	Priority :Slack	Task Title	Start Date	Resource	Project : Summary Task
Near Critical ?	1:1	Risk mitigation plan	05/17/19 (1 weekdays ago)	Craig M	DGA 900 Models: Planning Phase -> CDR (EC)
Normal ?	1:23	preliminary commercialisation plan slides	05/16/19 (2 weekdays ago)	Craig M	BMT 400: Planning Phase -> BOD-3 (Mack)
Normal ?	1:38	Write hardware validation tests	05/15/19 (3 weekdays ago)	Elm C	DGA 900 Models: Detailed Design (EC)
Normal ?	1:38	Setup for HW validation	05/15/19 (3 weekdays ago)	Elm C	DGA 900 Models: Detailed Design (EC)

Performance Measures

- Level of Interaction with Playbook

Department	Name	# OOD in Calendar	max days OOD in Calendar	# OOD in Game Plan	max days OOD in Game Plan	% of Days Logged In	# Created	# Edited	% Closed*	# of Unaccepted Tasks
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