From Millstones to Milestones (Dec 06)

Hanif Sazen shows you how to write plans for learning projects that win commitment and achieve results.

The nightmare begins
Perhaps you've been here. You know the situation: you've been appointed manager of a new project, perhaps its an e-learning project, you've been allocated a team, a budget and any other resources you can think of. You decide that your first task is to create a plan of course. So, enthusiastically you bring up Microsoft Project and spend the afternoon keying in detailed tasks, dependencies and resources. You have a plan and you're feeling pretty good about yourself.

A few days later, you present the plan to your team and to your sponsor. They're all impressed with your thoroughness which has convinced them that the project will be a success. You are still feeling good.

Then comes the nightmare. As you make progress on your project, you find that you are required to amend the content for new classes of learner; or you discover that your organisation has adopted a new learning management system (LMS). Priorities, resources and requirements all start to change and you feel pressure to reflect these changes in your plan.

So you end up spending more and more of your time keeping the schedule up-to-date. Your team never sees you and your plan never quite seems to reflect reality. You know this can't be right and soon enough you dump your plan because you simply don't have the time to maintain it.

Unfortunately, many task-based plans, not just e-learning project plans, go this way.

What is wrong with tasks?
Nothing is wrong with tasks, only the emphasis that we put on them. Tasks have a place in planning; sometimes, a detailed task list is just what we need to estimate how long the project will take. But an over-emphasis on tasks creates an unnecessary burden for the project manager and can easily create a false impression of how well the project is going.

Task-based plans encourage us to monitor progress by collecting actuals against each task and to report the tasks as being a certain percent complete. Not only is this time consuming, it hides the true progress that has been made.

Reporting that a task is 50% complete (based on the collection of actuals) tells you more about the effort that has been expended than it does about results achieved or when the work products will be completed.

How can we plan without planning tasks?
Unfortunately, many people are encouraged to be task-based in their thinking. Project management books tell us to focus on the creation of detailed task lists and many scheduling tools reinforce these habits. Open the user guide to Microsoft Project and you will read that planning a project is a matter of creating a schedule of tasks, assigning resources and adjusting resources to meet deadlines. What's wrong with this picture? There is so much more to planning an e-learning project, much much more that you need to think about before you start scheduling.

We suggest that you plan for results rather than plan for activity. And that means rethinking what a project plan is for. Consider a project plan as a contract between the parties involved. These include the sponsor who is paying for the project; the project team; subject matter experts; the hosting team; desktop support; external suppliers and any other stakeholders. Reaching consensus on the contract (or the plan) involves a process of negotiating on the following issues:

- What is the e-learning project intended to achieve?
What are the criteria for success?
Which products will be delivered?
Where will the resources come from?
How will you measure progress?
How will you manage risks?
Who is going to take responsibility for which work products?

All planning activity needs to address these crucial questions. You simply can't convey the essence of a project with just a list of tasks.

Is there a better way?
There is a way out of this madness. It is called Milestone Planning and it's an approach that we use for all of our e-learning development projects. Milestone Planning is a technique that truly focuses on results rather than tasks.

What defines a milestone?
The technique starts with the description of the project's final milestone. A milestone is defined in terms of:

- Its delivery date,
- The products and other outcomes that will be delivered by that date,
- The evaluation criteria that show that these deliverables are fit for purpose.

So the focus is on the tests that show that the milestone has been reached successfully and not simply because the delivery date has arrived!

Products (e.g. an hour's e-learning) tend to be easier to identify than outcomes (e.g. successfully installed on our LMS) but both need to be identified to ensure project success.

Where do we begin?
Milestone Planning 'works backwards from the final goal' to define the shape of the project. It does this by introducing intermediate milestones. For example, we know that the final milestone requires the course to be loaded on the LMS.

So we need an intermediate milestone by which the finished course will be delivered to the LMS hosting team and that date will need to be negotiated with them. If they need further time to test the course before they start to load it, we may need to introduce a further milestone to allow time for fixing any problems found during testing.

In this way, we shape the project by introducing milestones to manage business risk and ensure quality. Each milestone marks the completion of a product, the achievement of a quality target or the resolution of a business or technical risk.

We then summarise the milestone plan as a commitment calendar, which lists the major milestones and who is responsible for each delivery. This is the right level of planning detail to agree with the project sponsor and other stakeholders. It's much easier for them to see whether they will get what they want; it doesn't blind them with the irrelevant detail of scores of low-level tasks.

Having defined the project in terms of milestones, we write a project definition document that captures the essentials of the project and that can be used to negotiate the agreement to proceed.

This document will contain sections on the reasons for this project, what we are going to deliver by when, how we are going to do it, who is going to perform which roles and how we are going to manage risk.
The project definition document and the commitment calendar are more useful and much easier to negotiate with than a task-based plan.

Is this approach really different from what I do now?
Perhaps you are already using Milestone Planning in this way. However, in our experience, most managers define milestones very loosely. They see a milestone as the completion of a number of tasks rather than the delivery of products and outcomes.

For us, Milestone Planning has changed the way that we work:

Firstly, we keep our focus on the milestone and let individuals worry about the tasks. We only want to update our plan when a task is complete, so 50% or 95% complete is not a measure that we use; time to complete is a more valuable guide to progress.

Secondly, we get a clearer definition of where we are going with the project. Because we start with the final milestone, we agree what we are going to deliver early on in the project and we understand the constraints within which we have to work.

We then shape the project by defining tangible, measurable products and outcomes to act as intermediate milestones. We use the delivery of an intermediate milestone to measure progress.

I should care about this because...?
At the risk of sounding like TV evangelists, we believe that you will find the consequences of this results-based approach both motivating and constructive. You will find that your stakeholders are better informed, your plans are more flexible in the face of change and your progress monitoring gives you a realistic view of where you are and where you are going. You will end up using Microsoft Project in a different way. You start to plan by defining a project in terms of milestones rather than by entering tasks. This allows you to add detail only as and when it is required. Products and product quality take priority over tasks. This is not a licence for quick and dirty solutions! When we define success criteria, we make sure that we include the maintainability and extensibility of the e-learning course as much as its ability to fulfil the agreed instructional objectives.

Your project plans will focus on commitments by the project team and others, to achieve what is required for each milestone. Changing the date or the success criteria for a milestone requires re-negotiating the plan and these changes must be made visible. This is a plan that the project sponsor and other stakeholders should see. The project manager, however, is left with the freedom to re-assign or re-order tasks as he or she chooses provided that they do not impact the milestone. The detailed one-person-to-one-task plan is dead!

And finally,
Milestone planning has worked for us. It provides a practical approach to planning that is based on the real world.

These techniques can be scaled from the smallest one-person project to the most complex scenario-based e-learning projects.

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