White Paper 2015-13

Project Value Delivery's 20 Golden Rules for Project Scheduling

It is easy to implement scheduling processes without making them really useful and effective for the Project Manager. We have distilled a number of key principles for Project Scheduling in 20 principles – Golden Rules. They can easily be used as a reference to check if your scheduling process indeed responds to these basic requirements that will ensure that the Project will remain under control schedule-wise.

> **The main objective of Scheduling management is to enable the Project Manager and its management to take decisions derived from an accurate current knowledge and understanding of reality, with the aim of reaching a successful project outcome.**

From this broad objective, a number of Golden Rules describe the basic requirements of Schedule Management.

1. **Accountability:** Budget Owners are ultimately accountable for their schedule (including update and forecast). Planners support and challenge Budget Owners. The Project Manager is ultimately accountable for the entire Project schedule and shall dedicate sufficient time and effort on this essential navigation tool.

2. **Project Scope, Cost & Schedule consistency:** the Project schedule is at all times consistent, comprehensive and intrinsically linked with the two other sides of the Project Triangle: the Project Scope, and the Project Cost. The Project Scope is described in the main Contract or specification, including Change Orders and approved Changes. In particular, the Project Cost Model (including cost time-phasing consistent with the Project schedule) is continuously updated by the Project Control team consistently with the schedule.

3. **Align with the Project strategy:** in addition to remaining consistent with cost and scope, the schedule responds to the Project strategy: contractual strategy with the Owner/ Client and suppliers, decision-making logic, and more generally, execution strategy of the Project and key success drivers.

4. **Develop schedules from the top down:** to ensure alignment with the Project intent and design of best execution strategies, develop schedules from the Project strategy and objectives i.e. from the top of the scheduling hierarchy, and not from Detailed Functional Schedules.

5. **Reflect reality candidly:** The schedule must reflect candidly the reality of the Project progress status and associated re-forecast, however difficult or annoying this reality could be.

6. **Immediacy principle:** It is essential to reflect significant new schedule variances as soon as their occurrence is known (e.g. internal or Owner's instruction to proceed), at least in terms of order of magnitude, even if their exact final duration has not been fully assessed. Subsequently, immediate notification of the other Party to the contract is also essential to protect one's commercial interest.

7. **Implement a Proper Schedule hierarchy and formats.** Different scales, details level and views are suitable for different usages. Build a consistent schedule hierarchy and make good use of the different detail levels. Use different schedule views for different purposes and users.

8. **Limit detail and complication of the Integrated Project Schedule.** It should focus on functional interface and critical areas. 2,000 to 2,500 activities would be a maximum, with an emphasis on links between functions, and a proper balance between Project phases and functions. Choices will have to be made. It is linked to the necessity to have a comprehensive schedule hierarchy to respond to the needs of all Project contributors and stakeholders.

9. **Increase the schedule robustness and resilience instead of minimizing the Critical Path**. Increase the float of non-critical sequence of events to ensure they will not become critical, and introduce allowances and a contingency managed by the Project Manager.

10. **Float and Buffers are to be owned by the Project Manager.** Float knowledge and ownership should not be spread through the Project team relinquishing effective control. It is an essential Project management tool.

11. **Fight the 'virtual' float creation.** When a schedule moves to the right because of delays, in effect it creates float for all activities that have to be performed. Avoid this pernicious effect by sticking to the discipline of Convergence Planning and updating your Integrated Project Schedule so that this 'virtual' float is not unduly created where it should not. Introduce explicit buffers if required that remain under the control of the Project Manager.

12. **Be disciplined in updating the Convergence Plan.** Don't change the dates of the gates and only show deliverables completed when they are 100% complete. And when there are deviations, actual or forecast, the Project Manager and the supporting organization must take the relevant recovery actions.

13. **Update the schedule bottom-up** based on the Project extended team's knowledge.

14. **Check regularly the quality of the schedule update** to make sure decisions are taken on a robust basis.

15. **Base the schedule re-forecast on a root cause analysis,** not a simple bottom up approach. Use Earned Schedule as a useful challenge. Don't forget to reforecast accordingly future activities that would be impacted by the same root cause.

16. **Reforecast future activities based on the knowledge acquired from ongoing and past activities.** This is too often forgotten in schedule updates.

17. **Accuracy over precision:** schedule updates should be accurate but not necessarily precise. This important distinction should focus the effort of the scheduling team (ref. to Chapter 7).

18. **Ensure full traceability of all schedule logic changes.** This will help to support or defend against future claims.

19. **Raise Extension of Time requests as soon as they are known,** through the proper channel as described in the Contract. This will avoid cumbersome debates in hindsight and will ground compensation decisions in current reality.

20. **Understand and compensate for the known psychological biases** at play in Project schedules.

These rules will be further explained and expanded in the next White Papers and they also form the basis of our new Advanced Scheduling Handbook.

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> *Find all these principles of Advanced Scheduling exposed in a comprehensive manner in our Handbook,*
> **Advanced Project Scheduling for Project Managers**
> (2nd edition available
> in Paperback and Kindle versions!)
>
> *[all links to Amazon.com]*

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