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## Project Success Plans -- Planning for Success

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*“A Project Success Plan can be a platform for ensuring all project stakeholders start off,  
and continue on, the right footing.”*

Setting up projects to succeed in the view of the customer/stakeholder is a critical part of the Project Manager's role. We suggest that, as part of project planning activities in the early stages of your project, you should hold a Project Success Plan (PSP) meeting with all key team members to agree on the project's goals, and to discuss the emotional success factors that will ensure the team gels successfully to deliver the required outcomes.

A Project Success Plan (PSP) is different to a Project Management Plan (PM Plan), sometimes referred to as a Project Execution Plan (or PEP). A PM Plan is typically produced by the Project Manager to describe how the project will be managed and controlled in its delivery/execution phase, whereas the PSP is a documented meeting convened by the Project Manager to discuss and agree “what success means” to all key stakeholders. The PSP (like a PM Plan) should draw from project artefacts such as the Project Charter and the Customer Brief.

### Our Main Points

#### ***Point 1: Project Success Plans can help the team to “gel”***

Have you ever managed or been involved in a project where, at one point or another, you felt that you were not on the “same page” as other team members? Ensuring everyone on a project team is continually pulling in the same direction can be a challenge. A Project Success Plan can help you to set a solid foundation for stakeholder interactions throughout the project, and to ensure you can detect and rectify any occurrences where stakeholder views and actions start to deviate off plan. In order to ensure everyone starts off “on the right foot”, it is important to kick off your project communications strategy properly. By this, we mean ensuring that everyone's interpretation of success and their assumptions about the project are aired and discussed in an open group forum, which can be documented and evaluated in a Pareto-type chart format to indicate importance. This is the essence of the Project Success Plan.

The Project Success Plan (PSP) is a communications planning tool in the Project Manager's toolkit to get all key project stakeholders “on the same page”, and understanding each other's prerogatives and drivers for success. This is not always an easy task, since there are likely to be a range of drivers and interpretations of project success amongst your stakeholders. For example, team members who are recipients of the end solution/product may have very different views and expectations of what project success means to those who are focused on delivering the product. It is also likely that some (or maybe all) team members in your project will be working together to achieve a specific objective for the first time. Indeed, the number of stakeholders who have worked together on projects before is an interesting statistic for the Project Manager to take note of at a project's start.

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A Project Success Plan meeting should aim to achieve the following outcomes:

- serve as an “ice breaker” for team members to get to know a little about each other
- discuss and agree the basis for setting the criteria for achieving success;
- team members agree and commit to their roles and responsibilities for the project;
- everyone should understand each other’s personality and modus operandi;
- everyone’s assumptions about the project and their drivers should be aired, discussed and documented;
- a win/win philosophy and a collaborative approach throughout the project needs to be fostered, and;
- the team should discuss their collective lessons learned from previous projects/experiences.

The points above are all about communications and common understanding. By understanding how to handle your key/extended teams’ communications with each other, stakeholders can avoid accidental and sometimes costly mistakes in communicating information and decisions during the project’s life. For example, ensuring that people discuss how meetings, reports and controls should be conducted will help set reporting expectations (e.g. if one person thinks project status reports are “a waste of time”, find out why and talk it through).

Because of the “emotional” focus of a Project Success Plan (PSP) meeting, it should be held face-to-face whenever possible, however this may not be possible for smaller projects – particularly those that involve geographically disperse stakeholders. In such situations, a virtual conference meeting may be the most practical option. This requires special emphasis from the Project Manager in facilitating the meeting to validate everyone’s opinions frequently, ensure good feedback, and level set expectations for the project, since the important signs of body language will be missing.

***Point 2: The timing of a PSP***

A Project Success Plan should be completed early in the project’s life, as soon as all key members of the project team are in place. “Key members” are those with a material interest and/or delivery focus in the project. The timing for holding a Project Success Plan meeting can typically be after initial set-up works are complete and the project reaches the start of its detailed planning phase. If stakeholders change during the course of the project, the Project Manager should include reviewing and updating the PSP with the new stakeholders as part of the Resource Planning.

A Project Success Plan can also be a tool the Project Manager uses to keep the team focused and engaged. When stakeholders are suffering from project fatigue, the Project Manager can refer back to the PSP and use it to motivate the team by reviewing the reasons for the project and what success means to each person.

***Point 3: How should a Project Success Plan be structured, and do all projects need one?***

All projects will benefit from a Project Success Plan meeting, because it is a mechanism to ensure the following aspects are agreed:

1. Do we all agree on the core reasons for the project’s existence?
2. Are we all on the same page? Can we agree how to work together (including our roles and responsibilities, team meeting and communications protocols, team member working styles, governance processes and expectations)?
3. Are our assumptions about the technical aspects of the project (such as the design, scope, build methodology, work breakdown structure, schedule, budget and method of managing change) clear?

Large, complex projects have many different stakeholders, often spread across many geographic locations. A Project Success Plan for a large project may benefit from being led by a skilled facilitator, and it may need to last several days. Small projects with less complexity will typically not require the same level of detail.

The structure of a PSP meeting should ensure the emotional success factors are fully aired. It needs to bear relevance to the core Deliverables of the project regarding scope, budget, schedule and quality. An example of a PSP meeting agenda is shown below (the nature of your project's PSP agenda will be tailored to the project):

Agenda Item
1. Project Introductions and Executive Summary
2. What is the definition of "project success"?
3. Our Project Methodology
4. Project Fundamentals, Principles & Key Drivers
5. Project Assumptions by us all, and how we all work
6. Project Scope, WBS, Schedule, Quality and Budget
7. Project meeting, governance and review strategy
8. Project Organisation and Role Definitions
9. Communications Management strategy
10. Tracking Benefits after Go Live

### Our Conclusions

A (PSP) Project Success Plan is a mechanism to achieve the following positive outcomes for your project:




1. Ensure all assumptions about the project, and the meaning of success, are aired and discussed, and any misunderstandings and/or disagreements are resolved early in the project's lifecycle.
2. Ensure project team members get to know how to work with each other so that communications throughout the project are efficient and productive
3. Assist the Project Manager in keeping the team focused and engaged, especially on projects of long durations.

Done well, a Project Success Plan meeting can help Project Managers and the entire team understand how to work together successfully, communicate well with each other, and be a tool to keep the team focused and engaged for the duration of the project.

## Summary Extract

Planning for success increases your likelihood of a successful project outcome. It is always important to ensure the “facts” of project scope, schedule, design, quality and budget are given due consideration. It is equally important to ensure the emotional aspects of project teamwork – team member expectations, their way of working, their personal aspirations for the project and their assumptions on how the project will unfold – are managed. A PSP (Project Success Plan) is a method to bring out these emotional aspects. Done well, it can be a good platform to ensure the whole team continually pulls in the same direction to make your project a success.

## Bios

	<p><a href="#">Gareth Byatt</a> is Head of the IT Global Program Management Office for Lend Lease Corporation. He’s a PgMP® and PRINCE2 practitioner, and holds an MBA and first-class undergraduate management degree. Gareth has worked in several countries, and is currently located in Sydney, Australia. Gareth has 13 years of project and program management experience in IT and construction. Gareth can be contacted through <a href="#">LinkedIn</a>.</p>
	<p><a href="#">Jeff Hodgkinson</a> is the IT Cloud Program Manager for Intel Corporation. He is a 30-year veteran of Intel Corporation with a progressive career as a Program/Project Manager. Jeff holds numerous certifications and credentials in project and program management including PMI’s PgMP® (Program Management Professional) and PMI-RMP® (Risk Management Professional) credentials. He obtained his PMP® credential (#713) in 1991. He is located in Chandler, Arizona and also volunteers in various support positions for the Phoenix PMI Chapter. Jeff was also the 2<sup>nd</sup> place finalist for the 2009 Kerzner International Project Manager of the Year Award™. Due to helping people achieve their goals, ‘Hodge’ as referred to by his many friends is one of the most well networked and recommended people on <a href="#">LinkedIn</a>.</p>
	<p>Gary Hamilton is the Manager of the PMO and Governance within Bank of America’s Learning and Leadership Development Products organization. Gary has 14 years of project and program management experience in the IT, Finance and HR. Gary holds an advanced MBA degree in Finance and several certifications and credentials in project and program management including PMI’s PgMP® (Program Management Professional) and PMP®. He has won several internal awards for results achieved from projects and programs he managed. Gary can be contacted through <a href="#">LinkedIn</a>.</p>

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