

Activity Gateway Concepts

Activity Gateway organizes your world as a portfolio of activity centers. An activity center is a long lived entity which serves as a focal point of responsibility, activity, knowledge and evolving goals.

Any business department, IT system, or research initiative can be represented by an activity center. As can your significant customers, production processes, instruments, and infrastructure.

Each activity center has its own set of things to do, problems to solve, priorities, and goals. To the extent that each of them involves more than one person, they also have provision for activity related communication, documentation, and planning.

To accommodate a wide range of uses, Activity Gateway provides dynamic end-user configuration of activity services and the creation of use-specific forms and properties. So each activity center team can have exactly the elements they need, and nothing else - all without any programming or designer access.

Goals are created with activity centers to manage date-specific objectives such as projects and contracts. Multiple goals can be used to manage complex, multiphase projects.

Unlike a project system, however, the completion of a goal is merely an event in the life of a center, not the end of the center's life. This makes it very useful in IT work where "project done" is really just "version 2 start" and where non-goal related maintenance activities popup daily to consume development resources.

An activity is an assignment of responsibility to a particular person to get something accomplished by a specific date.

Because there is so much variety in professional work, we have created a whole vocabulary of activities. These include Action Items, Changes, Deliverables, Goals, Problems, Risks, Opportunities, and some others. But every one of these is simply a way to assign responsibility for a result by a date to a person.

Note that the key word here is "responsibility" Unlike a "task", an activity does not specify labor hours or start dates, only results. Hence this is system designed for professionals, not day labor.

This also means that activities can be of any level of difficulty and assigned at any level of your organization.

In a task based world, “Land on Moon by 2015” cannot be assigned to anyone because it clearly requires the work of thousands. But in AG, it is a perfectly reasonable activity to assign to the head of the Goddard Space Flight Center.

Note that, in assigning responsibility for a high level objective, you are also transferring the burden of planning and supervision.

Responsibility is a two way street. When an activity cannot be accomplished, it is the responsibility of the assignee to push back until a balance is reached. Whether that means negotiating with your collaborator or appearing before Congress is just a matter of scale.

Now, while an activity does not have a “work estimate” in the labor allocation sense, it is possible to attach a time period based labor estimate to any activity, goal, or center, and to record the actual work done in its execution. The allocation of labor is independent from the assignment of responsibility.

What this means in practice is that you can budget and report labor at a high level without the need to allocate and report effort on hundreds of individual activities. Or not do any at all.

One of the key concepts in this application is that of “connections”. Every activity in this system is a member of an Activity Center. The same activity may also be part of a Goal. The same activity might also be part of the work done for a Request.

These three relationships, Center, Goal, and Request are groupings. Large numbers of activities can belong to each group.

But there is also a more intimate level of connection, the connection between individual activities.

Consider this. When someone asks you to deliver something such as a report, the first thing that probably comes to mind is how to obtain the required information. To the extent that this will be your work alone, your response is to start early enough. But should you require work from another, you need them to do an activity and get it done in time for you to accomplish yours.

This is what we call a “supporting” activity relationship. My task depends on the prior completion of their task.

If you think about this for a just a moment you will quickly realize that most of our activities are done in supporting roles.

In Activity Gateway, an activity’s relationships are determined by the place (i.e. the document) from which it is created.

- When you create an activity from an activity center profile, it will belong to the center.
- When you create an activity from a goal, it will belong to that goal as well as to the center to which the goals belongs.

- When you create an activity from the create button on the top of an existing activity, you will be creating a “supporting” activity as well as another member of the center and possibly a goal.

This is not going to be a surprise. The menu will say “Create Supporting Action Item” or “Create Supporting Deliverable”.

The new activity form will display the name of the supported activity and ask for “Lead Time” rather than “Due Date”. Why? because supporting activities are supposed to be done before the due date of the activity they support! Lead time is a lot easier to think about than calendar dates when sequence is involved.

Any number of “supporting” items can be created from a single activity. For example, a major deliverable might have 10 supporting sub deliverables, all of which are needed to complete the top line assembly. Each of these, in turn, might require a sequence of action items.

In the other direction, however, an activity supports, at most, only one other activity directly. This is almost always the activity from which it was created. (Note, we qualify this only because it is possible to change the choice of “supported” activity, but this is an exception.)

This leads directly to the concept of group enabled planning.

Let’s say that I assign you a large complex deliverable. In the classic model of project planning, I, the omniscient planner, will know that this deliverable will require 6 specific sub-deliverables and who should make them. Further, I will know exactly the sequence of action items to be done to create each of those sub assemblies, who must do them, how long each will be allowed to take, etc. In the extreme case, I will just pass out to do lists and start my clock.

Now, you can do this in Activity Gateway if you want to, just start typing.

On the other hand, you can simply assign the top level deliverable to the responsible person and let them assign the necessary sub deliverables to others. Those others, in turn, can assign whatever supporting actions they need in order to meet their due dates. etc.

The key idea here is that you are assigning responsibility for results. This makes use of the deep subject matter expertise of your team to find the right way to get the job done. It also gives you more time to concentrate on the clear definition of the desired results which benefits everyone.

If you contrast this process with conventional project planning you will see some differences. First of all, task definition is done backwards from your goals, not forward from some start point. Second, the work plan will be evolving over a period of time as people think through their responsibilities. Third, every activity is created in the context of a very specific parent activity, hence, there is little room for misunderstanding, and a very specific person from whom to get clarification. Finally, activities are assigned by the people who need the results, hence there is a peer to peer chain of accountability and expectations being created.

Now, this method has some possible downsides. As the network of supporting assignments is created, you may simply run out of lead time. In such a situation, the path backward will have to be reviewed by everyone to find a shorter route, or the final objective will have to be moved.

The GoalMap™ lets you see and manipulate the activity pathway.

Second, since activities do not have “estimated work hours”, it is possible to assign an impossible list of deadlines to an individual. The Activity Pipelines display lets you see the distribution of activities across individuals and time to minimize such problems. It is also expected that individuals will push back on unreasonable expectations.

SUMMARY OF KEY CONCEPTS

- Activity Centers exist to consolidate work related to a business unit, device, process, customer, or initiative.
- Goals provide a project style, objective focus within a Center when and where that is appropriate, and then fade into the past as they are achieved.
- Activities are tools to assign the responsibility for results to individuals.
- Activities exist in a context based upon their point of origin. Often they are created to support other activities. Such planning can be done in a highly collaborative fashion.
- Labor allocation and time measurement are supported, but are independent of responsibility and may be at a higher level than the activities.