

Rethinking Project Planning: Introducing the Task Checklist

Over a hundred years ago, Henry Gantt made the observation that all work can be reduced into specific tasks. Half a century later, the task became the essential component of the PERT and CPM modeling processes that form the basis of today's project management.

Although conceptually simple, the actual specification of tasks is difficult. For planning purposes, you want to have as few tasks as possible, because otherwise your project network becomes hopelessly cluttered. For communication purposes, you want very well defined and simple tasks, so they are precisely understood. This conflict is inherent because real project management is a balance between planning and execution.

As the central component of the project modeling process, each task must not only specify some required action, but also a starting time, an ending time, a resource assignment, an amount of work, a cost, and sequence relationships to other interdependent tasks or events. Eventually all of this detail must be reflected in the measurement process. Hence the very small, detailed tasks that are effective for communication become burdensome for planning and measurement.

When planning tools are placed in the hands of technical managers, project plans often become so detailed as to create significant reporting overhead for the whole organization. Still, one can argue that, if detailed instructions are not provided, the work may not be done correctly or not done completely. The right balance is hard to achieve when the only entity available for planning, communication and measurement is a task.

Project Gateway 6 introduces a true solution to this problem by adding the concept of a checklist into the planning, reporting and tracking of the task. While a simple concept, the task checklist may well be the most significant change in planning in many years.

A task checklist provides a way to specify and measure details without the overhead of planning and tracking start times, end times, effort and cost on every detailed item. As discrete deliverables, each checkable item provides a point of communication, measurement and exception tracking. But unlike discrete tasks, individual checklist items require only one click to report.

Checklists Simplify Planning

The checklist capability means that the lowest level of traditional technical project plans, which typically contains 80% of the tasks, can be largely eliminated with no loss of control and a great reduction in reporting labor. Where there might have been 5 tasks, there can now be one task with a checklist of 5 or 10 specific deliverable items. The reduced task count greatly reduces the time spent in estimating, scheduling, schedule revision, reporting, and correcting reporting errors and allows the planner to spend more time thinking about the specifics of the work.

In the Project Gateway system, task checklists can be created using Microsoft Project, Schedule Templates, or simply written as the task is defined. And checklists can be added or revised on existing tasks at any time. The checklist can be unique to the task, or can be selected from a list of predefined checklist types.

Easy, Integrated Reporting

It is essential that progress reporting be easy for participants to do. To this end we have integrated checklists directly in the timesheet process. Every time you use a timesheet to report time spent on a task,

you also update the checklist for that task. With checklists in use, the participant reports on fewer separate tasks, but provides greater detail on each.

As a general rule, all the items on a task checklist are expected to be completed when the task is finished. If not, the system forces the user to provide an explanation and forwards that explanation to the project leader. These "incomplete checklist" items are tracked in project statistics and in exception reports.

One of the systems features will automatically create Issue documents for incomplete items. These issues bring the missing accomplishments to the level of the management team and ensure that they are resolved in a timely manner.

The system also provides a way to update all of the open checklists for a person at any time, so you don't have to wait until the end of the week to report accomplishments.

Advanced Features

Each task maintains a log of its checklist that records when each item was declared to be done and who made the assertion. The log also records explanations for incomplete items and records of third party verification or rejection.

The system provides for third party verification of specific checklist items. This means that truly important deliverables will be double-checked by a member of the project leadership.

It provides ways to tag items that must be completed early in the task rather than being due only at the end.

Additional features are available to trigger notifications when done, or to make some checklist items optional.

Summary

Checklists are a significant addition to the project management technique. When fully integrated into the project process they reduce planning and reporting labor, simplify project scheduling, and improve measurement and exception tracking. We are very pleased to provide this capability at the core of Project Gateway.