



## Rapid Initial Planning™

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### Accelerating Information Technology Project Initiation

Rapid Initial Planning accelerates today's best practices in project management. Rapid Initial Planning is one of a series of consulting services provided by GOFF Associates, Inc., the ProjectExperts, and our consulting associates who are licensed and certified in our methods. We also license the methods, tools and techniques to our customers for your in-house use.

We have successfully transferred our Rapid Initial Planning processes to our customers. We provide a facilitator training process for those who wish to demonstrate and perfect their skills. Andl, participating in a session facilitated by our consultants can be a valuable learning experience for Project Managers who wish to perfect their project management skills.

We teach the foundations of Rapid Initial Planning in our workshops, including our *Modular Project Management* series, and in *Risk Management* and *Software Cost Estimating* classes. For more information concerning Rapid Initial Planning, or our consulting and training services, contact:

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# Overview of Rapid Initial Planning

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## The Initial Planning Problem

*The Problem:* Most organizations fail to perform an appropriate amount of early project planning. Often we compound this problem with unrealistically tight time frames, inconsistent processes, and insufficient resources.

Some project teams lack the skills needed to perform this crucial management activity of early planning. Thus the project (and your organization) suffers from missed deadlines and budget overages. **“If you fail to plan, you plan to fail.”**

*One Solution:* Rapid Initial Planning (RIP) is a time-compressed method for initial estimating, risk assessment, structuring and planning of larger projects. It improves communication of the factors that affect project success, customer ownership, and team effectiveness. It can also produce a more complete plan.

The RIP process is most effective in Information Technology projects, where uncertainty is high, and the organization is committed to success.

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## This Paper's Objectives and Audience

The objectives of this paper are to:

- Provide an overview of a more consistent Initial Planning process that is suitable for projects
- Identify the different types and timings of RIP sessions
- Establish the prerequisites and pre-work for RIP sessions
- Describe the scope and deliverables of the types of RIP sessions
- Clearly distinguish between successful a RIP session and a phrase with the same acronym, *Rest In Peace*. We see too many projects that choose the latter.
- Show why RIP is an attractive time-compression *and quality* strategy

*Audience:* The audience for this paper is Business Area Managers, Information Technology (IT) Managers and Project Managers. It is also useful for Enterprise Executives who wish to accelerate their projects, reduce risks and increase the quality of their business results.

*What is **not** the purpose of this paper:* The purpose of this paper is not to show *how to perform* Rapid Initial Planning. The methods require specialized project management and group facilitation skills.

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## Overview of Rapid Initial Planning

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**What Is Rapid Initial Planning?** Rapid Initial Planning (RIP) is a Rapid Application Development or Time-Compression approach for project planning of medium-to-very large Information Technology projects. It uses group facilitation and advanced project estimating, risk management and project management, methods to accelerate early project planning.

The purpose of Rapid Initial Planning is to *accelerate* early project estimating and planning, and to build a stronger foundation for project success. It does so by producing a *better* plan, and improving communication about the factors that affect project success, customer ownership, and team effectiveness.

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**RIP Based on Repeatable Process** Rapid Initial Planning accelerates the repeatable process of your software engineering methodology (a prerequisite). Using a repeatable process with automated project support tools allows us to accelerate the beginning of any project.

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**A Service or Transferable Process** We can facilitate RIP sessions for all customers who use our methods, or have their own. For customers who do not have a repeatable process, we can supply one for you. We can also transfer the technology to your own practitioners.

*For customers with their own Software Engineering methodology:*

Note that our Methodology Enchantment service assists you to license our project methods and tools to improve and enhance your own methodology.

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**RIP Process, Duration and Results** A RIP session brings customers, Information Technology managers, and team members together in a facilitated session. The result: you produce the appropriate Project Management deliverables for a medium, large, or very large project.

### *Typical Duration*

Typical RIP duration ranges from two-to-three days, plus a day or so for wrap-up. The actual duration depends on the size of the project, the type of session, the completeness of the pre-work, and the scope of the deliverables. We have done major program RIP Sessions lasting five days. You spend a large portion of that time in facilitated sessions. You spend the remainder processing the results and producing recommendations for approvals.

### *Results*

Rapid Initial Planning produces project management outputs, and reduces risk. The specific results depend on the type of session. They usually include a high-level project plan, and supporting work papers. Of course, project management software captures all the information. This plan provides the basis for more detailed planning of the next immediate phase(s) by the project team.

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## Different Rapid Initial Planning Session Types

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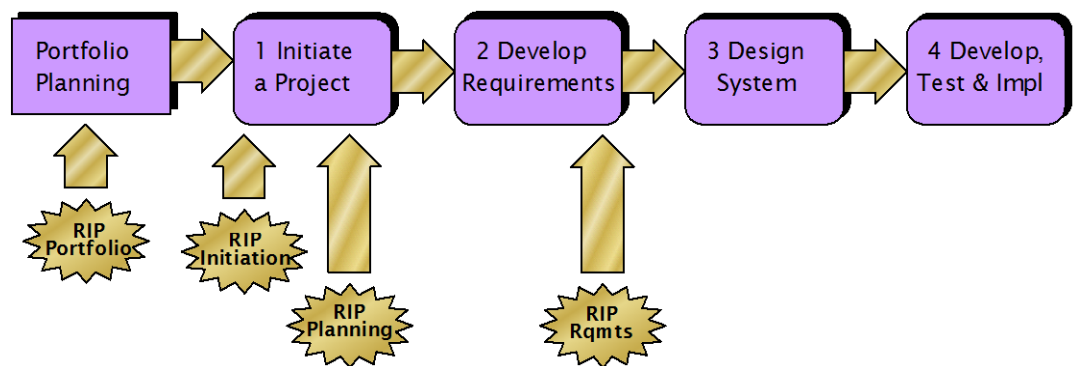
**Different Project Sizes** We offer four different types of Rapid Initial Planning sessions. The one you use depends on the size and timing of your project. We define our project sizes here:

- Small projects are up to 360 hours of work effort; they require no RIP.
- Medium projects are from 360 to 3600 hours of work effort: Those above 900 hours can benefit from a RIP Planning session.
- Large projects are 3600 to 24,000 hours; those more than 6,000 hours require breakdown into multiple subprojects, with separate teams and team leaders.
- Initiatives are very large projects, with more than 24,000 hours of effort. We use RIP sessions to break them into multiple projects and subprojects.

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### Rapid Initial Planning Types

Review the graphic below to see the timing of each type of RIP session.



Here is a summary of the four types of Rapid Initial Planning sessions:

- RIP Portfolio — High-level sizing, sequencing, staffing, and scheduling of a portfolio of 4-10 medium to large projects in one business area.
- RIP Initiation — Large project or Initiative Kick-off: High-level sizing, risk assessment, sequencing, staffing, and scheduling of a large project or initiative.
- RIP Planning — Medium or Large Project Plan: Produce early sizing, risk assessment, strategies, staffing, schedules, and milestones, using automated support. This session completes a Document of Understanding for the project.
- RIP Requirements — Requirements or Design Update for an Initiative or Large project: This is an update and expansion of the project plan, using the results of good Requirements Definition, or completion of Design.

The RIP Requirements produces more reliable estimates, using Application Point Analysis. It also produces an updated risk assessment, subproject partitioning, strategies, staffing, schedules and milestones.

**RIP Follow-up:** For added benefit, follow-up your RIP session with our Project Audit Support Service (“Will Your Project PASS?”). Six different reviews of results can validate your project success. Contact us for more PASS information.

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continued

## Different Rapid Initial Planning Session Types, continued

### RIP Types Introduced

Each type of RIP has different timings, deliverables and options. The table below clarifies the various RIP processes (call us about the RIP Review). The optional deliverables require additional time in the Rapid Initial Planning session.

RIP Type	Duration	Timing	Participants/Prereqs.	Deliverables
<b>RIP Portfolio</b> 1 - 2 Initiatives, 5 - 7 large projects or 15-20 Medium ones	3 - 5 days, plus 1 - 2 days wrap-up	Pre Project	Business Area Managers IT Subject area experts IT Resource managers  <i>No prerequisites</i>	High level sizing Project priority/sequence Staffing plan Cost estimates Milestone schedule
<b>RIP Initiation Initiative</b> , over 24K hours  Large project, 3.6K - 24K hours	2 - 3 days, plus 1 day wrap-up  1 - 2 days, plus 1/2 - 1 day wrap-up	At very beginning of project	Customer Representative IT Resource manager Project Manager IT Subject area experts  <i>Prerequisites:</i> Participants answer a list of key questions	High level sizing Risk assessment Subproject sequence Staffing plan Cost estimates Milestone schedule First phase plan <i>Opt'l: Ben/Cost Analysis</i>
<b>RIP Planning</b> Large, 3.6K - 24K hours  Note: Break larger projects into sub-projects  Medium project, 2K – 3.6K hours	2 - 3 days, plus 1 day wrap-up  1 - 2 days, plus 1/2 day wrap-up	End of First phase, after completing software engineering activities	Customer Representative IT Resource manager(s) Project Manager IT Subject area experts Key team members  <i>Prerequisites:</i> Preliminary requirements, problem analysis and objectives; participants answer key questions and complete a Risk Assessment questionnaire	Early project estimates Most-likely strategies Risk assessment Staffing plan Cost estimates Milestone schedule Change Management plan Status Tracking/Rptg plan  <i>Optional:</i> This session can produce the Problem analysis, objectives, and benefits; Next phase plan
<b>RIP Requirements Initiative</b> , over 24K hours  Large or medium project, 2K - 24K hours	2 sessions, 4 - 6 days plus 2 - 4 days  2 sessions, 2 - 4 days plus 1-2 days	After completing Requirements, or after Physical Design	Customer Representative IT Resource manager Project Manager IT Subject area experts Key team members  <i>Prerequisites:</i> Requirements or Design complete; plus individual completion of the Risk Assessment questionnaire	Object Point Analysis Updated risk assessment Updated project estimates Revised strategies Updated project plan: staffing, costs, schedule Updated documentation  <i>Optional:</i> Benefit/Cost Analysis, Plans for next phases

## RIP Portfolio: Sizing and Staffing Multiple Projects

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<b>Timing and Purpose</b>	<p>A RIP Portfolio session occurs before the projects begin, typically as part of a Strategic Planning or annual budgeting process. Its primary purpose is to determine sizing, priorities, staffing requirements, funding costs per year, and a high-level schedule for the subject projects.</p> <hr/>
<b>Unique Characteristics</b>	<p>A RIP Portfolio is unique, in that usually the participants are not involved in the actual projects. This has two impacts:</p> <ul style="list-style-type: none"><li>• There is less need for team ownership. This reduces time requirements.</li><li>• The need to document assumptions is much greater, increasing time required.</li></ul> <p>When well facilitated, RIP Portfolio requires less time than conventional portfolio planning. This can present a challenge, since the process of a RIP Portfolio is somewhat different from the others, requiring different skills and tools.</p> <hr/>
<b>Preparation</b>	<p>To prepare for a RIP Portfolio, assure the following:</p> <p><i>Scope Management</i> A RIP Portfolio session can deal with 6 - 10 related large projects, or 4 - 6 unrelated large projects. For a very large project (an Initiative), we recommend a RIP Initiation instead, unless an Information Engineering Enterprise Plan exists.</p> <p><i>Participants</i> Make sure you have the Information Technology subject area experts present and key customers and IT managers available.</p> <p><i>Materials</i> Provide copies of the available documentation for any existing manual or automated systems, if they exist.</p> <hr/>
<b>Deliverables</b>	<p>A RIP Portfolio produces estimates, resource demand and costs, and schedules:</p> <p><i>Estimates:</i> High-level, re-entrant estimates (you can adjust them when circumstances change) for each system, with documented assumptions.</p> <p><i>Resource Requirements:</i> Broad resource requirement demand, by quarter, together with a cost profile per project, and for all projects.</p> <p><i>High-level Schedule:</i> A quarterly schedule with major milestones for each project, and projected completion of each, given the documented assumptions.</p> <p><i>Priorities:</i> Relative priority influencing factors and ranking among the systems.</p> <hr/>

## RIP Initiation: Large Project or Initiative Kick-off

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### Covers The First Activity of a Project

A RIP Initiation session completes the first activity of any large or very large project.

There is no need for the power of a RIP in a medium project, since the activity that gets a project started is less than a day's time for the right team members.

However, in a larger project (more than 6,000 hours of effort), there is a need to structure the subprojects and build a staged plan. This plan reflects the subproject architecture, the milestones of each, resources needed for each, and the major milestones where you will evaluate the whole project's progress.

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### Preparation

To prepare for a RIP Initiation session, assure the following:

#### *Scope Management*

A RIP Initiation session completes the first project activity for one large or very large project: One that requires breakdown into multiple subprojects.

#### *Participants*

Make sure you have the IT subject area experts present and key customers and IT managers available.

#### *Materials*

Provide copies of the available documentation for the existing manual or automated system, if it exists.

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### Procedure

The agenda steps for a RIP Initiation session are:

1. Gather information about the project.
2. Make a preliminary sizing of the project.
3. Establish initial strategy and subproject architecture.
4. Develop and review initial phase and project milestone plan.

*Note:* Best practice is to follow a RIP Initiation with the appropriate number of RIP Planning Sessions.

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### Deliverables

A RIP Initiation session produces estimates, architecture, and a high-level plan:

*Estimate results:* High-level sizing for each component of the system, with documented assumptions; an optional risk assessment and management plan.

*Architecture:* An initial strategy or approach, partitioning of the system into subsystems, and an overview of the way the parts will fit together.

*High-level Plan:* A High-level schedule with major milestones and resource requirements for each subsystem. Includes overall completion dates, given the documented assumptions. A detailed schedule for the rest of the first phase.

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# RIP Planning: Phase 1 Rapid Initial Planning Sessions

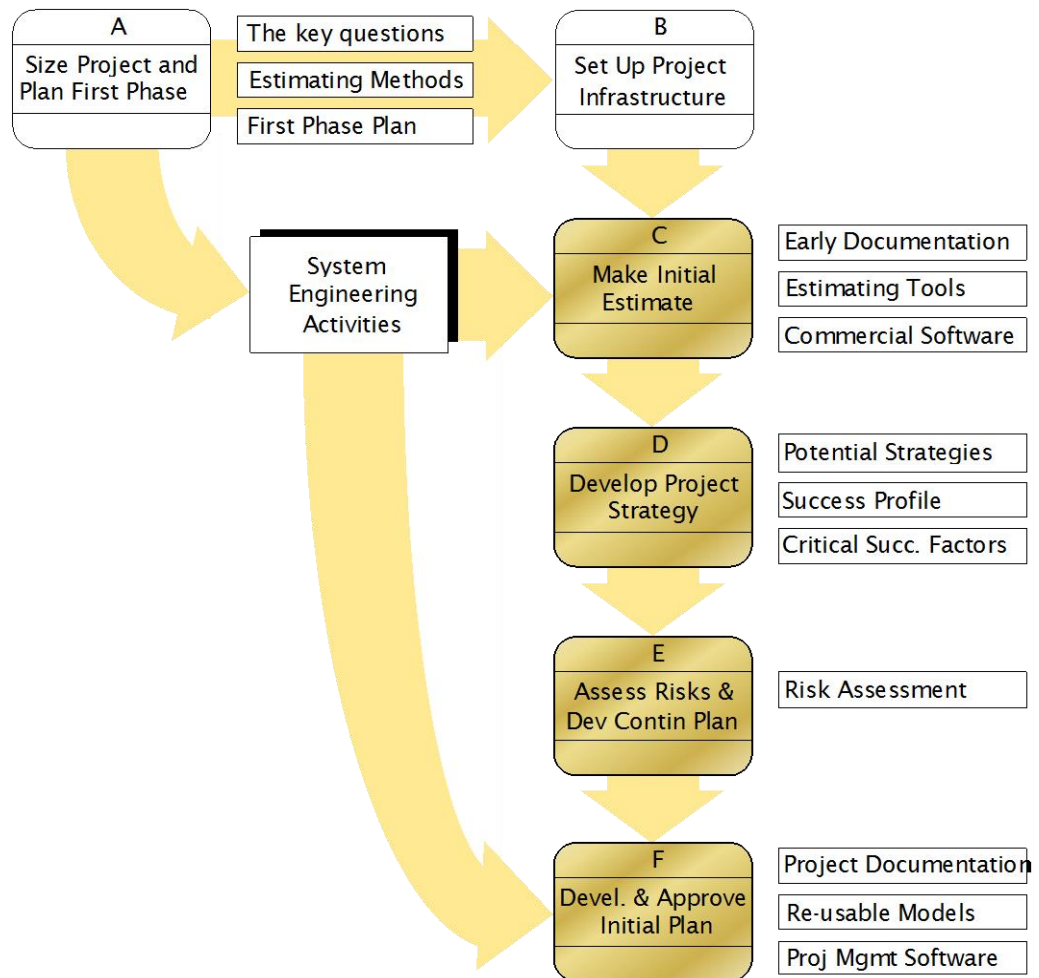
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**Covers First Phase Project Activities**

RIP Planning sessions complete the Project Management activities of the first phase of a single Medium or Large project.

The diagram below shows typical first phase activities of a project, and the tools or techniques you use. The shaded project management activities are those that we cover in a RIP Planning session. Note that the first activity is a prerequisite; also, you must complete, review and approve the Preliminary Study Report (results of the System Engineering Activities).

**The First Phase Activities**



## Preparation and Results for a RIP Planning Session

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### Preparation is key to success

To help you prepare, here is a list of the specific pre-requisites for RIP Planning:

- You must size the project (a RIP Initiation, or the first project activity finished). This provides information needed to schedule the Rapid Initial Planning session.
  - You must complete and review the Software Engineering activities (preliminary requirements, problem analysis, objectives, and business case). You use this information as input to the estimating process.
  - Option: Include Problem or Opportunity Analysis, Benefits and Value of Solution, and Application Objectives in the session for a medium project. This typically extends its duration by one day.
  - Participants prepare pre-work, based on instructions. Pre-work includes answering key questions and completing a Risk Assessment for the project, plus making an initial estimate of highest and lowest effort.
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### RIP Planning Process and Deliverables

The RIP Planning session produces these deliverables *for one project*, ready to formalize and approve as a Document of Understanding, Contract, or Proposal:

#### *Estimate results*

We use Quest For Better Estimates<sup>®</sup> for improved estimates and traceability.

- Completed or updated responses to most important questions
- Consensus Estimates and COCOMO environmental Factors
- Distribution of project effort across phases, and evaluation of the impact of approaches and strategy on the project's estimates
- [Option] One additional estimating approach, if customer prefers (i.e., Object Points, if appropriate, or commercial software, if available on-site, or other).

#### *Strategy results*

- Recommended ideal project duration, staffing and strategy, together with analysis of critical success factors and risks of selected strategy. For large projects, the strategy also reflects subproject architecture.
- Fallback or alternative strategy
- Listing of other factors that affect project strategy

#### *Risk Assessment results*

- Assessment of project risks, classed by Size, and Structure, Technology
- Micro-risk management actions: Specific actions for reducing individual risks
- Macro-risk management approaches: Broad strategies and individual responsibilities for managing risks

#### *Initial Plan results*

- Completed project documentation and high level schedule for selected strategy
  - High Level plan in Microsoft Project, as framework for detailed phase plans
  - Resource commitments needed, with a list of key assumptions for the project
  - [Optional] Phase plan for the next immediate phase
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continued

## Preparation and Results for a RIP Planning session, continued

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### RIP Planning Sample Invitation Letter

To help you obtain the involvement of the right people, here is a sample letter inviting participants to a RIP Planning session.

#### E-MEMO

Date: 4/6/2015

To: John Strong

From: Rick Muldoon (*note: Letter is from project sponsor*)

Topic: RSR Rapid Initial Planning session

We have scheduled the Rapid Initial Planning session for the RSR project to begin next Monday, the 12th. Your involvement will not be continuous during the whole 3 day session. During the first hour, we will develop a refined agenda. That agenda will show the approximate times when we need to have you present.

Also attending the session will be Norm, IT manager, Don and Bill from the IT team, and Pete, George and Rebecca, from other customer areas.

I am asking each participant to prepare for the session by reviewing the preliminary study, which I believe you have, and by completing the following materials, which I have forwarded to you via E-Mail:

- Risk Assessment Questionnaire
- The 20 Questions (answer only those that are relevant to you)
- Your Initial High/Low estimate of total hours of effort to deliver this system, with assumptions (use the sheet labeled Model-1).

GOFF Associates, Inc. will facilitate the session. Damian will be assisting. We think he will be able to certify as a facilitator during the next year — then we can RIP through all our projects!

## RIP Requirements: Requirements or Design Update Sessions

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### Provides Better Estimates and Project Plans

RIP Requirements sessions are your last opportunity to use facilitated sessions to accelerate and improve project planning. What distinguishes the RIP Requirements session is the quality of the Software Engineering information (Requirements Definition or Design) that is available. This information results in the first really reliable estimates (and thus schedules) for the project.

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### Preparation

To prepare for a RIP Requirements, you need your original project plan, and current actual status. Also assure that you have completed the following:

#### *For a Post-Requirements RIP*

You need comprehensive requirements, including five types: functions, performances, information, constraining and subjective. You need process and data models. Ideally, you have mockups or prototypes of all outputs, and your metrics database, containing a history of comparable projects.

#### *For a Post-Design RIP*

All above materials, plus subsystem design and preliminary program architecture, including detailed examples of each input, output and inquiry, and file structures for all internal files and interface files. Ideally, you also have completed documentation for all interactive systems.

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### RIP Requirements Process and Deliverables

The RIP Requirements session produces these deliverables:

#### *Estimate results*

We use Quest For Better Estimates<sup>®</sup> for improved estimates and traceability.

- Object point analysis for the entire system, grouped by subsystem.
- Estimates of effort and cost for the remainder of the project.

#### *Strategy results*

- Verification or adjustment of project strategy and subsystem architecture.
- An updated subsystem project strategy, including ideal duration and staffing, together with analysis of critical success factors and risks of selected strategy.
- An updated risk assessment, with risk mitigation action plans and strategies.
- Listing of other critical success factors that affect project strategy.

#### *Project Plan results*

- A Model (high-level) plan for the remainder of the project.
  - Updated staffing requirements and cost information.
  - Updated project support documentation, including assumptions.
  - Milestone plan of all subprojects in Microsoft Project, as a framework for detailed phase plans.
  - A baseline measure of scope (in Object points), for use in managing change.
  - [Optional] Benefit/Cost Analysis for the resulting system.
  - [Optional] Phase plans for the next immediate phases for each subsystem.
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## Preparation for a Rapid Initial Planning session

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### Preparation is key to success

Just as with any successful project, preparation is key to Rapid Initial Planning. After deciding which type of Rapid Initial Planning session is right for you, prepare for success by following these guidelines.

#### *Staffing Guidelines:*

- Participation of the right decision-makers is crucial. You need the availability of all those who can affect the success of the project.
- Involve Information Technology managers who allocate staff to the project.
- Core team members who will serve as project and team leaders should attend. Also subject area experts, who have relevant experience with the application.
- Participants must be available for the duration of the session. However, you probably do not need *managers* continuously during the session. Thus you provide a schedule of needed times once you set the agenda for the session.
- For very large projects, there are two facilitator roles: One role manages the “tools and techniques”. The other facilitates the interpersonal communication. You can manage Medium projects and Portfolio and Initiation RIPS with one facilitator serving both roles. Medium and Large projects have one facilitator.

#### *Pre-work*

Participants independently prepare pre-work, based on the type of RIP. Pre-work typically includes answering key questions and completing a Risk Assessment for the project, plus making an initial estimate of highest and lowest effort.

#### *Physical Facilities*

- Site arrangements: Off site, quiet room, conference table, comfortable chairs
- Equipment requirements:
  - High-output LCD Projector (2000 + Lumens best) and screen
  - Flip chart stand and 2 pads
  - White Board (automated white board is a “nice to have”)
  - Laser printer
  - Photocopier, capable of duplexing and collating, nearby
  - Power supply block and extension cord
- Materials (binders, stapler, copy paper, hole punch, masking tape)
- Several copies of your software engineering methodology

#### *Facilitator Preparation*

If you use a software engineering methodology that the facilitator is unfamiliar with, he or she needs a copy of it for review before the session. If your organization has a metrics database, that information is invaluable for translating the results of a RIP Requirements Object point count into estimates of work effort.

The Facilitator generally *prefers to have* copies of the current Software Engineering deliverables (Preliminary Study, Requirements, or Design Document) and participant pre-work, for review before the session.

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## How RIP Fits With Other Time Compression Methods

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### Time Compression Defined

Time Compression methods are ways to reduce the duration of Information Technology projects, while increasing the quality of the results. Using group facilitation, they often reduce the effort (and cost) required to produce the results.

#### *Component of RAD*

Time Compression methods are a key component of Rapid Application Development (RAD), popularized by James Martin, and increasingly used by leading Information Technology organizations.

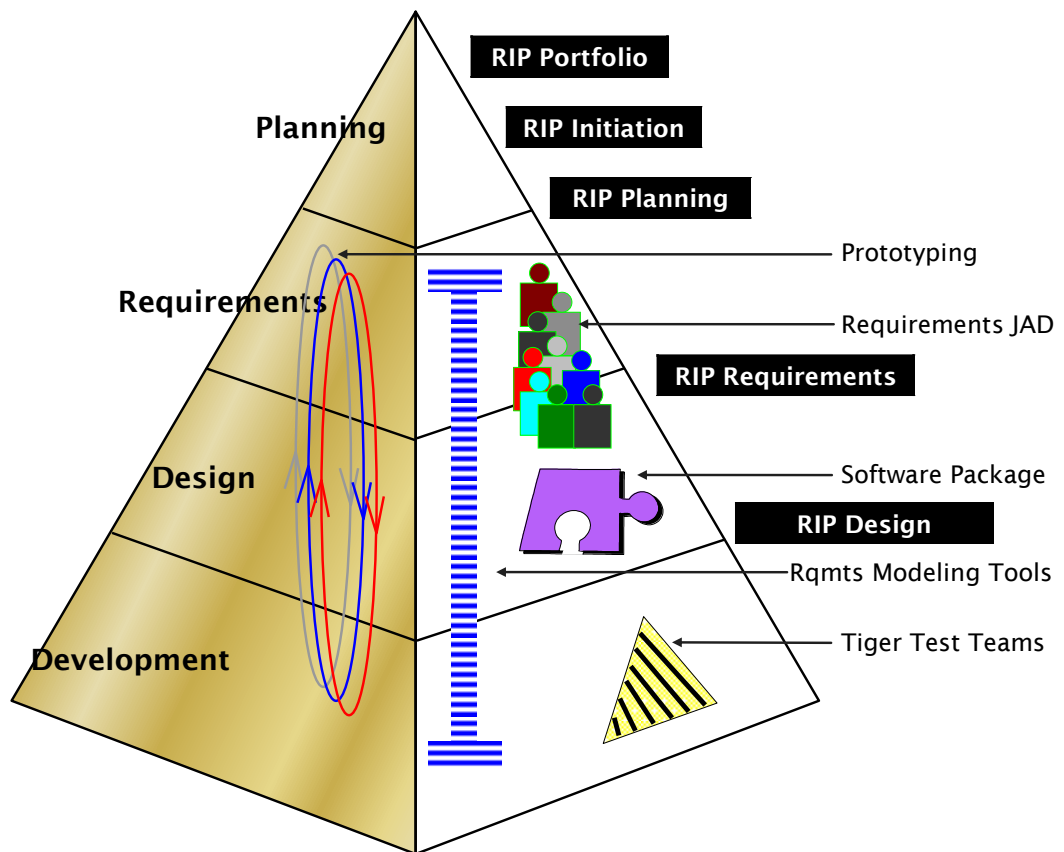
#### *What Time Compression is not:*

Time compression does not mean skipping or eliminating needed deliverables. While this misguided approach can appear to reduce duration, it always reduces the quality of the results, and usually increases the cost and actual duration.

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### Totally RAD

A full Rapid Application Development approach would begin with Rapid Initial Planning, then use the best of breed of other Time Compression and RAD approaches. Later RIP sessions combine results from multiple subprojects, and update the overall project plan. See the next page for an example project.



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## How RIP Fits With Other Time Compression Methods, continued

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### Time Compression Example

This example uses a selection of Time Compression approaches to accelerate a project, then compares the results to a conventional structured approach. It assumes that you are familiar with the subject Time Compression approaches.

#### *The Example Project*

A large project, with a preliminary estimate of 16,000 +/- 6,000 hours of effort, must be completed within seven months. An enterprise data model exists, but the resulting application will create about 30% new data.

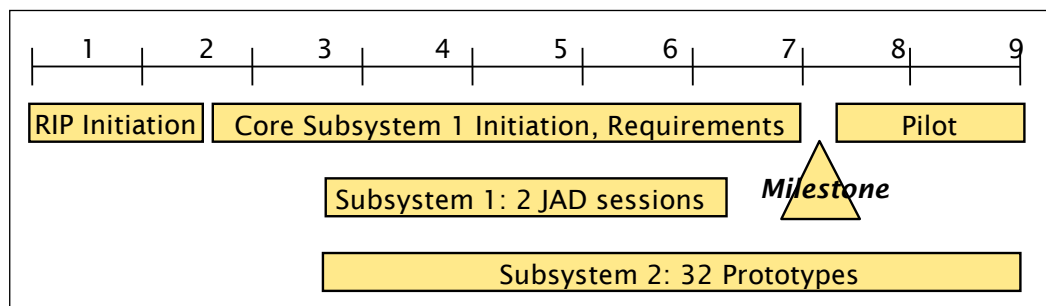
The project is a high priority for the organization, with a high level of customer commitment for its success. The organization is highly mature, has successfully used and refined a consistent, repeatable process such as THE Guide, and has collected data for a metrics data base for the last year.

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### Perform a RIP Initiation session

#### *Week 1: Perform a RIP Initiation session*

A three-day RIP Initiation session (with some components of RIP Planning) produces an architecture consisting of three subsystems and four chronological stages, based on their characteristics, data structure, and primary functions. The Information-based components will be Prototyped, using 3-iteration control.



The Risk Assessment reveals a potential problem with the compounded effects of several intended new component design technologies. The team spins off a pilot project to learn about the technologies, and to test for potential performance problems. Due to the use of the JAD Sessions, ADAPs (specialized JAD sessions), and Requirements Modeling tools, the Requirements are complete within seven weeks. The team schedules a RIP Requirements session for the week before the Milestone Review.

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### Perform a RIP Requirements session

#### *Week 7: Perform a RIP Requirements session*

A four-day RIP Requirements session finds the originally scheduled prototypes to be 60% complete, with all models having at least their second iteration. The team counts the Object Points for the system, based on user-developed documentation. The Object Point counts for the Prototypes form the time box limits for the remaining iterations for each prototype.

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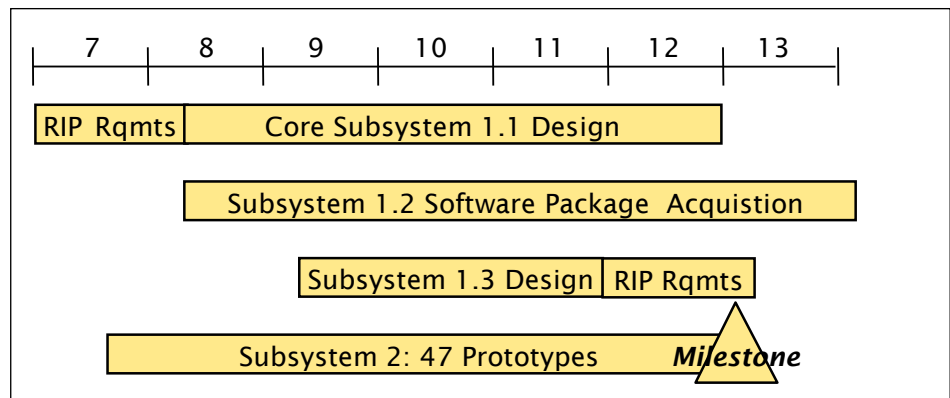
## How RIP Fits With Other Time Compression Methods, continued

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### RIP Requirements, continued

Based on the work performed during the first stage, and reflecting scope added during the JAD Sessions, the revised estimate for the project is 18,000 +/- 4000 work-hours (total). The updated Benefit/Cost Analysis shows a 4.5:1 return on investment for the proposed system, up from 3.5:1. The increase is from the high-return functionality added during the JADs.

The RIP Requirements session further subdivides the system according to uniqueness, and work begins on a Software Package acquisition. 25 of the 30 prototyping candidates that were deferred during the first stage are within the scope of the software packages. The remaining prototypes add to the prototyping subsystem, together with 12 that resulted from the JAD Sessions.



Requirements Modeling tools update the corporate repository, and generate an orphans list for design consideration; still, the data design is 80% complete. Now the challenge will be to integrate the data design of the selected package software, and to tune the resulting design for performance.

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### Perform Design phase RIP Requirements session

#### *Week 12: Perform a Design phase RIP session*

The primary purpose of this 2-day RIP session is to update the estimates and schedules based on the Software Package findings. It also produces a detailed plan for the remainder of the project. It assesses the level of completion of the documentation, test plan and training, since there is usually not time (or energy) for those key components once coding and testing begins.

The session verifies that all but twelve prototypes are complete, including documentation. The twelve that remain have completed their second iteration. Several package interface issues remain to be resolved. The test plan is complete, together with Requirements Modeling tool-generated test paths and data.

The current estimate for the project is 19,000 +/- 2,000 hours. The team expects to finish the project within the originally approved schedule and cost.

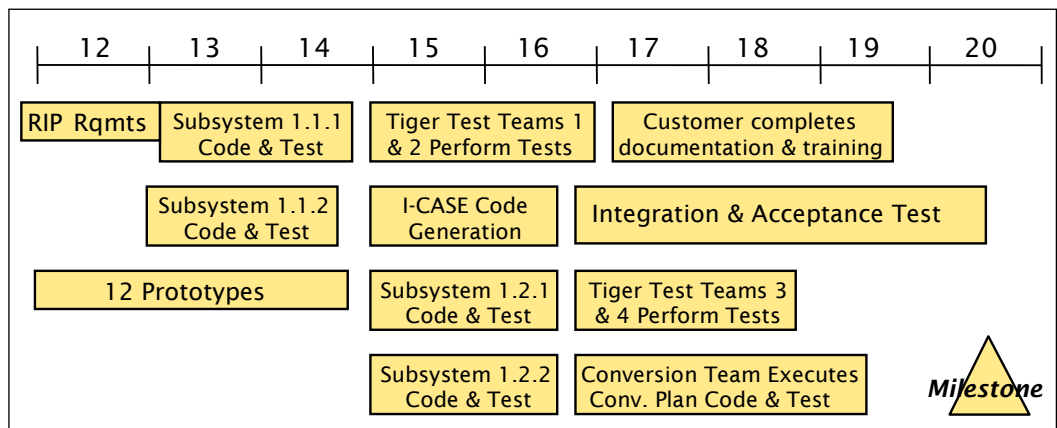
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## How RIP Fits With Other Time Compression Methods, continued

**Perform a Design RIP, continued** The Design RIP refines the plan for the rest of the project, and updates the overall plan. The project is still on schedule, but the scope has grown a little more.



The Requirements Modeling (RM) tools generate code for 30% of the system. The prototypes require a little performance tuning, but represent another 25%. The software package interfaces represent the bulk of the code to be written.

The test plan includes use of dueling tiger test teams, in competition for defect detection. The test plan also implemented defect seeding, to help determine defect detection rate. The RM tools have independently identified test metrics to evaluate testing results. Winning test teams will receive a cash bonus, paid for out of the savings from using accelerated approaches.

### Perform a Project Review

*Week 20: Perform an End-of-Project Review*

The Project ended on schedule. Total effort was 20,125 hours, including all testing, documentation and needed training. Twenty-five open Change Request items have been deferred to the six-week defect-recovery period. Since both tiger test teams exceeded defect detection metrics, they each received their bonuses.

The evaluation team compared this project's Accelerated approach to similar projects that used good software engineering methods and found the following:

Vital Sign Factor	Accelerated Methods	Software Engineering
Schedule	Less than 5 months, plan and actual	10 months planned, 12 months actual
Cost	\$1,197,650 (including SW Package)	\$1,080,000 (including SW Package)
Peak Staffing	26, during Requirements	21, during the Construction stage
Scope	3659 delivered Object Points	2250 delivered Object Points
Return on Invest.	5.6 : 1	3.6 : 1
Risk	Recognized and reduced most risks	Recovered from risks encountered
Technical Quality	80% of defects corrected	60% of defects corrected
Subjective Quality	Customers excited, Team satisfied	Customers highly satisfied

## Rapid Initial Planning Success Stories

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### **Saving US Warship Building Capacity**

If you have just a bit over two years to demonstrate a complete, end-to-end Product Data Management System, and your best estimates show it will take more than three years; if you have 12 IT staff, while peak staffing needed would be 60; if even then there is a less than 50% chance of success, *what would you advise?*

If the consequence of failure in this program is that you can no longer bid on contracts to build new Warships for the US Navy, does that make the recommendation easier? ProjectExperts' Rapid Initial Planning, plus this company's stellar Executives helped make a difficult decision; one that led to survival of a key USA Defense capacity. All in ten days!

We started with a separate analysis of all information and process requirements for a Product Data Management system, plus an analysis of existing systems. Our business partner Dan Myers, of Requirements Solutions Group, completed this analysis in one week, working with this company's executive leadership team.

Then we worked with the same team the next week to partition the massive program, estimate the components, assess risks, identify staffing requirements, and develop a high-level program plan. Our conclusion: Even after two years and hundreds of millions of dollars, the company faced a high possibility of failure.

Of course, we identified smarter alternatives, and the executive team spent the last half day of our Rapid Initial Planning session preparing their proposal to their Board of Directors. The Board accepted their proposal, and the organization thrives today. You'd have to contact us to learn more of the details.

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### **An American Dream**

A highly successful company whose founder developed custom-made cultural theme dolls was growing so fast that it was rapidly outgrowing its complete financials infrastructure. Once again, Dan Myers, of Requirements Solutions Group, worked with ProjectExperts and the top-level managers of the organization. This organization had just a handful of Information Technology staff.

After the one-week Rapid Initial Planning session, we produced all the typical results of an intensive RIP session. Those included primary program results, components, delivery options, cost and staffing estimates, duration and staging of many sub-projects, a risk analysis, and recommendations. Our final recommendation: Contract with one of the Big Five firms in whom we have confidence, and having industry experience to install and integrate a leading software package.

We informed them of the probable bid amount and duration, the greatest risks, and the key questions to ask to select the successful bidder. The bid was higher than we estimated, but they negotiated it downward, using our information. The project was completed successfully within the agreed upon time and cost. The company thrives today, 20 years later, as a division of a major corporation.

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## Rapid Initial Planning Summary

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### When is RIP Not the Answer?

Note that Rapid Initial Planning is not for everyone. For example, these are situations where you should probably not consider this powerful method:

- When you do not plan to use consistent software engineering methods. If this is the case, any estimating and scheduling that we could do would reflect an ideal case, rather than the actual situation. RIP would only be a waste of time in this situation, unless you use it to *establish* consistent methods.
  - If internal customers and/or IT management feels such pressure (usually deadlines) that they feel they cannot spend time helping develop a viable plan.
  - If the project is too small for this method. RIP can be overkill on a small to medium project.
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### RIP Results In Higher Quality

The Rapid Initial Planning session helps assure that the other use of its acronym will not occur for your project: *Rest In Peace!*

In addition to the specific deliverables, the RIP session also produces benefits that are more difficult to quantify, but have lasting impact on project quality, communication and commitments. The “soft results” include:

- Better management and customer understanding of the factors that affect the project, resulting in greater flexibility in scheduling, staffing and scope.
  - Increased customer satisfaction with the results, due to more active participation in their definition and decision-making.
  - Improved definition (and resulting control) of the factors that often change, resulting in project cost and schedule overages.
  - Your team gains a can-do attitude about the project, an understanding of the plan and a path to quickly begin it.
  - Management selection of and commitment to a strategy that results in the maximum needed scope, delivered as effectively and promptly as possible.
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### Ideal Training Approach

A novel way to use the RIP is as a training session for your Project Managers. What better way to learn to use the powerful tools and techniques of today's advanced project management, than to apply them to your own project!

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### Your Next Step

If you think RIP is appropriate for you, here are your next steps.

1. Determine if your project's size and timing makes it a viable candidate.
  2. Decide which Rapid Initial Planning session is most appropriate.
  3. Contact us for RIP Facilitator availability (or, to train your own staff).
  4. Check to assure that you have all the prerequisites and participants available.
  5. Work with your manager to schedule and apply our unique RIP process.
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