

Organizational policies and procedures may influence which scheduling techniques are employed in these decisions. Techniques may include, but are not limited to, rolling wave planning (Section 6.2.2.2), leads and lags (Section 6.3.2.3), alternatives analysis (Section 6.4.2.2), and methods for reviewing schedule performance (Section 6.7.2.1).

### 6.1.2.3 Meetings

Project teams may hold planning meetings to develop the schedule management plan. Participants at these meetings may include the project manager, the project sponsor, selected project team members, selected stakeholders, anyone with responsibility for schedule planning or execution, and others as needed.

## 6.1.3 Plan Schedule Management: Outputs

### 6.1.3.1 Schedule Management Plan

A component of the project management plan that establishes the criteria and the activities for developing, monitoring, and controlling the schedule. The schedule management plan may be formal or informal, highly detailed or broadly framed, based upon the needs of the project, and includes appropriate control thresholds.

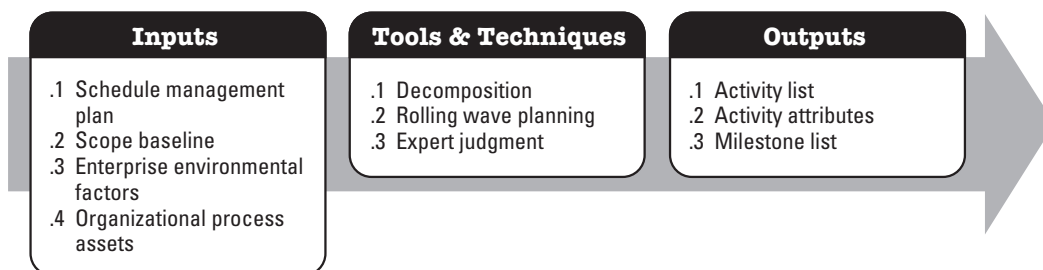
For example, the schedule management plan can establish the following:

- **Project schedule model development.** The scheduling methodology and the scheduling tool to be used in the development of the project schedule model are specified.
- **Level of accuracy.** The acceptable range used in determining realistic activity duration estimates is specified and may include an amount for contingencies.
- **Units of measure.** Each unit used in measurements (such as staff hours, staff days, or weeks for time measures, or meters, liters, tons, kilometers, or cubic yards for quantity measures) is defined for each of the resources.
- **Organizational procedures links.** The WBS (Section 5.4) provides the framework for the schedule management plan, allowing for consistency with the estimates and resulting schedules.
- **Project schedule model maintenance.** The process used to update the status and record progress of the project in the schedule model during the execution of the project is defined.
- **Control thresholds.** Variance thresholds for monitoring schedule performance may be specified to indicate an agreed-upon amount of variation to be allowed before some action needs to be taken. Thresholds are typically expressed as percentage deviations from the parameters established in the baseline plan.

- **Rules of performance measurement.** Earned value management (EVM) rules or other physical measurement rules of performance measurement are set. For example, the schedule management plan may specify:
  - Rules for establishing percent complete,
  - Control accounts at which management of progress and schedule will be measured,
  - Earned value measurement techniques (e.g., baselines, fixed-formula, percent complete, etc.) to be employed (for more specific information, refer to the *Practice Standard for Earned Value Management*) [9],
  - Schedule performance measurements such as schedule variance (SV) and schedule performance index (SPI) used to assess the magnitude of variation to the original schedule baseline.
- **Reporting formats.** The formats and frequency for the various schedule reports are defined.
- **Process descriptions.** Descriptions of each of the schedule management processes are documented.

## 6.2 Define Activities

Define Activities is the process of identifying and documenting the specific actions to be performed to produce the project deliverables. The key benefit of this process is to break down work packages into activities that provide a basis for estimating, scheduling, executing, monitoring, and controlling the project work. The inputs, tools and techniques, and outputs of this process are depicted in Figure 6-5. Figure 6-6 depicts the data flow diagram of the process.



**Figure 6-5. Define Activities: Inputs, Tools & Techniques, and Outputs**