In the beginning, the planning process is executed as described:

- Ensure requirements are baselined and documented
- Assist in negotiations between groups and customers
- Consider incremental delivery: What does the customer need first, second, and third?
- Avoid making detailed commitments before planning and management review are complete

During the project, the planning process steps are treated as a toolbox of methods.

- Create WBS and estimates:
  - Conduct Delphi session:
    - With broad or focused scope
    - On high-risk sections of WBS
    - When many opinions exist
    - When historic data are not available
- Realize this estimate is uninterrupted effort:
  - How many hours in each day?
  - What is included in this estimate, what is not?
  - Keep a separate list of overhead activities and major delays
- List the assumptions the estimate is based on
- Use the estimate format:
  - [Estimate, assumptions, rationale, confidence]
Develop schedule, include:
- Absolute task dependencies
- Estimates (uninterrupted time)
- Delays (blackout in calendar or include as a task dependency)
- Overhead (time allocation)
- External dependencies
- Actions to reduce risk likelihood
- Actions to reduce risk impact
- Resources per task

Move high-risks tasks earlier

Align what can be done with what is needed:
- Evaluate scope, resources, quality and process alternatives
- Look for options & decision points

Focus on the critical path
(those activities that impact the final date)

Negotiate and align customer requirements with planning results

Negotiate (what):
- Date, functionality, incremental delivery, quality, process and resources

Negotiate (how):
- Separate the people from the issues
- Understand the interests of the other party
  - Interests=Why (position taken)
  - Brainstorm options to achieve interests
  - Use objective data, e.g., historical data, Delphi results, WBS, risk plan
  - Know your Best Alternative To Negotiation (how far do you want to take this?)

Commit or negotiate
- Is the level of risk acceptable?

Communicate:
- Accomplishments and plans
- Actual status of current project/next phase (what is unfinished?)
- Risks of current project/next phase
- Problems and issues to be resolved
- Status of the Critical Path
- Publish minutes
- Review meeting effectiveness

Determine:
- Are we on track?
- Actual uninterrupted effort used
- % work actually complete
- How accurate were our estimates?
- Do we need to replan?
- If necessary, replan the project, realigning the commitments and resetting customer expectations