

Pull Planning – Questions & Statements to Aid Facilitation

Note: The list below pertains to the LCI NorCal presentation “Facilitate a Pull Plan to Help Meet Owner Expectations” held on August 8, 2018. This provides additional context to help attendees have the conversations necessary to build confidence in their planning sessions, and dive deeper in meaningful discussions with their teams.

- I. Slide Title: Pull Planning – General Guidelines
 - a. Topic: Setting Time Expectations During Session
 - i. “We will take the next 10 minutes to identify tasks needed to meet this milestone.”
 - ii. “Let’s get our sticky notes up in 30 minutes!”
- II. Slide Title: Start the Conversation
 - a. Topic: Identifying Risks & Opportunities
 - i. “Are there concerns or issues that would cause you to use less productive assumptions?”
 - ii. “Are there opportunities that would allow you to forecast increased productivity?”
- III. Slide Title: Capture Tasks
 - a. Topic: Building Clear Expectations for Hand-offs
 - i. “What should the photo of the completed work look like?”
 - b. Topic: Determining Durations
 - i. “How does the estimated duration compare to the best project you have been on?”
 - ii. “What can the team do to help improve this duration?”
 - iii. “What are your lessons learned from past projects? How can we build these learnings into the plan?”
- IV. Slide Title: Formalize the Plan
 - a. Topic: Allocating Buffer
 - i. Where should we add buffer if we are finishing earlier than the expected milestone finishes?
 - b. Topic: Addressing Late Paths
 - i. “Where do we need to recover if we are past the milestone date?”
 - ii. “What changes in what you get from others would shorten your durations or allow you to begin your work earlier?”
 - iii. “If you reduced the batch size of your work, how would that improve your efforts?”
 - iv. “If you changed your crew size, how would that improve your efforts?”
- V. Slide Title: Conclude the Session
 - a. Topic: Revisiting Parking Lot Items
 - i. “Who will do what by when?”