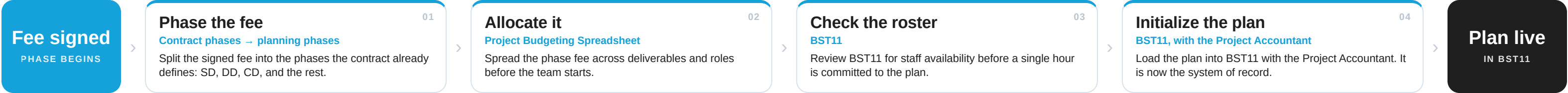


THE BIG IDEA

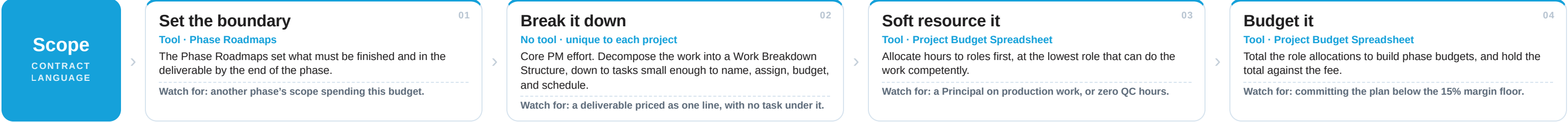
A signed fee becomes a plan only when it is phased, priced, sequenced, and staffed in Grace’s system. The seven step method below makes each number in it defensible.

01 GRACE’S PROCESS — SIGNED FEE TO A LIVE PLAN

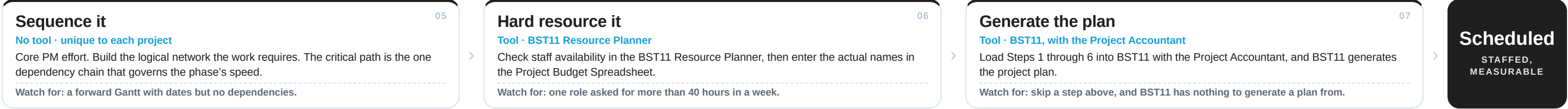


02 THE SEVEN STEP METHOD — BREAK IT DOWN ENOUGH TO DEFEND THE NUMBERS

PART A · ESTABLISH CLARITY · WHAT, WHICH ROLE, HOW MUCH



PART B · CONTROL ADVANCEMENT · WHEN, AND WHO



03 DO NOT BLUR THEM

SOFT RESOURCE — WHICH ROLE

The budget

Assign each task to a role, the lowest one that can do it right. This is what builds a budget you can defend before a single hour is spent.

HARD RESOURCE — WHICH PERSON

The roster

Assign the role’s hours to a named person, and confirm they are not already booked elsewhere. This is what makes the plan staffable.

Keep them separate — one prices the work, the other confirms the roster can deliver it.

04 WHAT PLANNING OPTIMIZES

Financial plan
Constraint · the fee available
The budget and the cash flow: how money gets spent over the life of the phase.

Task plan
Constraint · the work still to be done
The work itself: what gets done, and in what order it happens.

Resource plan
Constraint · the people available
The staffing: how many hours of each role the schedule demands, week by week.

Three plans run at once
Every phase, all the way through
Move one and you move the other two. Plan them together or the schedule will pick for you.

05 THINGS TO REMEMBER

HABITS · 1 OF 2

Fund the time the plan needs

- Fund PM time. 10% of the phase budget is a good baseline.
- Fund review time. 2 to 5% of the phase fee is appropriate.
- Plan review time. The due date is not the due date.

HABITS · 2 OF 2

Write it so someone can run it

- Name the task itself. Give it one role, an hour count, and a done state.
- Sequence the handoffs. Know who needs what from whom, and when.
- Write for all five readers. The team, the client, the reviewer, the firm, and you.

06 WHERE PLANNING BREAKS DOWN — FOUR TRAPS, AND THE STANDARD

