

How to create transparency and clarity with Master Schedules

What is a master schedule & why is it important?

Despite having a likeness in appearance to a Gantt chart, a Master Schedule is not just a project plan. It is a simple, but powerful, tool for planning and monitoring transformation within the context of events happening throughout an organisation. There are usually an abundance of project plans within most organisations, each focusing on a different project, at different levels and managed by a variety of people. A Master schedule brings all these individual project plans together and is used in a very different way.

Formed of two distinct but interlinked parts, Master Schedules account for both the 'business stuff' (all those project plans) and, most importantly, the transformation plan of an organisation. By bringing it all together within one Master Schedule, the organisation gets complete visibility of upcoming tasks and activity, any project dependencies that exist and a clear picture of where resources are tied up at any one time, ensuring a focus on transformation is maintained. Lean transformation is not implemented in isolation, so bringing it all together is pivotal for it to be successful.

The purpose of a Master Schedule is to monitor and deliver transformation, on time and in full. Properly done, it will ensure management time, team meetings and peer conversations concentrate on delivering required transformation tasks to agreed levels of quality and to the required timescales. As such, it is a tool that provides robust, structured and yet simplified headline project management.

Key benefits of a master schedule include:

- Provides a visual way to see what needs to be done – people can only react to what they can see or know
- Uses a structured 'red line' process to ensure plans are completed in a timely manner
- Involves all levels – planning and transformation is not uniquely a management responsibility
- Is developed together with line management to give ownership
- Ensures projects or tasks don't fail between the gaps

A Master Schedule takes into account the hierarchy within an organisation and ensures that it ties together the executive and strategic level with the frontline, where a lot of the change activity takes place. The idea is to ensure that people see the level of information that they need to at their respective level. A summary Strategy Schedule and a detailed Area Schedule are often used hand-in-hand with a Master Schedule. They ensure that a golden thread of transformation activity runs from the top of an organisation to the frontline, with the schedule getting more detailed and activity based as it gets to frontline staff. The three combined ensure transformation activity is aligned throughout the organisation.

How to create and use a master schedule?

A top-level Master Schedule is built by the Senior Management Team of an organisation, usually as one of the outputs of a Lean diagnostic. The steps to develop a Master Schedule are relatively simple, but this does not mean it should be taken lightly – detailed planning and a number of alterations are necessary to get it to a realistic plan.

Five basic steps to creating a master schedule:

1. Make a list of all the Lean activity that needs completing – common tasks are those that come out of diagnostic exercise, which will include value stream mapping workshops, frontline suggestions, setting up of Information Centres and roll out of 5S each of these should be on post-its.
2. Create a list of activity showing all the upcoming events, projects and deadlines – for the whole organisations – again transferred to post-its
3. Using a wall or white board, create a 'calendar' stretching over 6-24 months, and add in all activity – transformation & 'business as usual' then capture into a spread sheet
4. Validate the Lean roll out plan with all the relevant managers individually and then with them as a team to gain agreement; print on to A1 and get the final version on to the Information Centre for weekly review using the red-line technique
5. Roll out the Master Schedule and start to create localised Master Schedules.

We would always recommend completing steps 1, 2 and 3 on a roll of paper using post-it notes, before transcribing the plan onto an electronic template in steps 4 and 5, which may seem iterative but allows more realistic planning and negotiation.

The Master Schedule is then reviewed on at least a weekly basis by the whole team, usually at the team Information Centre. A red line is drawn to measure against expected performance – where the task for the previous week has been completed, a straight red line is drawn; where a task has not been completed to plan, a spike is drawn backwards to the task. We call this ‘red lining’. The result is a highly visual track for the team to quickly and simply see where they have been successful and where they need to focus on remedial action. At a team level it can be more appropriate to have a detailed Area Schedule, a schedule that further breaks down the transformation activity into tasks, to accompany the Master Schedule.

It sounds simple, but there are pitfalls – if it is done correctly it is a real aid to transforming your organisation. Done incorrectly it can become just another project plan.

Common pitfalls

- Insufficient consultation to develop a realistic plan – getting everything completed in 3 months sounds great, but is rarely achievable
- Localised plans don’t maintain a link to the Master Schedule thus they become just plans – this can lead to things getting missed as well as staff focus being drawn to the wrong tasks
- Master Schedules are not made visible enough – Master Schedules are a visual management tool so they have to be where everyone that needs to see them can see them (not on an electronic spreadsheet)
- Master Schedules are not communicated to all staff often leading to a lack of buy-in

Key principles to remember when you are developing a master schedule:

- Master Schedules must be activity driven – each line should be a specific task
- They must be simple to read and understand – the 3 minute rule applies i.e. somebody should be able to look at the Master Schedule and understand it within 3 minutes
- The Master Schedule must be communicated to all levels
- It should be signed off to show the ‘Owners’ (usually senior management) have agreed and are bought in to the vision

- It must be regularly reviewed – every week to optimum for most organisations

In our experience, the act of creating the Master Schedule in itself is illuminating and value adding for senior managers. It is often a revelation for each individual to become aware of just how much is going on, and what colleagues are managing. It also, sometimes for the first time, allows them to all have the same perspective of the organisation as a whole, and most importantly, it allows the sensible and realistic scheduling of the actions required to transformation.

Say hello

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