# What Is Construction Planning? Five Steps to the Perfect Process.

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As a construction manager, you've got to be a master at construction project planning to complete projects on time and within budget. Not having a construction project plan in place can lead to costly design and implementation mistakes, even regulatory flaws. But what exactly is construction planning, and what does a successful planning process look like?

With an assist from the top construction software and a five-step process, you can help your construction company consistently finish projects on time and within budget.

In this article, we've taken the well-known five phases of project management - concept and initiation, planning, execution, performance/monitoring, and project close - and adapted them to fit your needs as a construction project manager. We've also explained how software can help at each step.

But first, let's start with the basics.

## What is Construction Planning?

Construction planning is the specific process a construction manager uses to lay out how they will manage and execute a construction project, from building design to completion. It lists the activities and schedule for each part of the construction process.

A construction plan defines the scope of work, sets timelines, allocates resources, and establishes communication protocols. In short, it's the master plan that ensures a construction project runs smoothly and meets all its deadlines, budget constraints, and quality standards.

## 5 Steps to Ace Construction Planning

### STEP #1: INITIATE THE PROJECT

Every construction project, no matter how big or small, needs to start with a business case that lays out the feasibility of the project and what it's going to take to get the job done.

Start by creating a project initiation document (PID), which

describes the following in general, not technical, terms (the technical part comes later):

» **People:** Number of workers needed, including contractors and subcontractors such as plumbers and electricians.

» **Resources:** Materials needed for the design and building plans.

» **Budget:** Total cost estimate of the project, including labor, materials, equipment, fees, and permits.

The purpose of this document is to outline, both for your stakeholders and your crew, the resources you'll need to complete the project.

### STEP #2: CREATE THE PROJECT PLAN

Now comes the part where you'll turn the PID into a more concrete construction plan by setting goals that are S.M.A.R.T. and C.L.E.A.R. You'll take the specific resources you've listed in the previous step and use that to inform a broader strategy that will guide how you actually execute the project.

Let's start with the definition of S.M.A.R.T. goals:

» **Specific:** Set specific goals for your project, such as deadlines for key milestones.

» **Measurable:** Agree on how you will measure success for goals. For example, is it good enough that you have started laying concrete by the deadline you set, or should it be completely set by that date?

» **Attainable:** You need to have a plan in place for how you're going to achieve these goals. For example, does your project depend on a specific material that might not be available in the quantity you need when you need it? If so, you need to make adjustments.

» **Realistic:** Your goals need to be within your abilities as a construction manager. For example, if your project includes plans to get the electrical work done within three months when you've never done it in less than six months for a project of this size, you're setting yourself up for failure.

» **Timely:** Lay out a specific time frame within which you can realistically expect the project to achieve these goals.

Next, let's take a look at C.L.E.A.R. goals, which are a slight variation on this strategy:

» **Collaborative:** Get everyone on board. Before the project begins, hold a meeting with the entire team to lay out what's expected and have them help you identify any possible obstacles.

» **Limited:** Limit these goals both in terms of scope and time frame to not get overwhelmed.

» **Emotional:** Ensure your goals will get your employees fired up and on board.

» **Appreciable:** Break up big goals into achievable tasks so you don't overwhelm your workers.

» **Refinable:** Be flexible because you can never predict what will happen on a construction site.

### STEP #3: EXECUTE THE PLAN

It's time to execute your plan. Begin by creating a high-level project timeline, including major milestones and key deliverables, to keep everything on track. Once you have a timeline in place, start mapping out the details of each project stage.

Next, call a team meeting to go over the project plan and construction schedule. Talk to each person on your crew individually, if possible, to discuss expectations and allow them to ask questions about anything they're confused about.

You might also need to assign a project manager(s) to oversee your teams. If you're a very small business, you may be the only project manager, but you need to have a schedule drawn up of what you'll be checking and when.

### STEP #4: TRACK PROJECT PROGRESS

It's essential that you accurately track the performance of your construction project team and ensure they're meeting the parameters you've set. In the event of an unsuccessful project, this process ensures you have data that you can dive into to figure out why you failed so it doesn't happen again.

Successful construction managers typically use key performance indicators (KPIs) to monitor the performance of their projects. Some typical KPIs you can track include:

» **Project objectives:** Are you on schedule and budget?

» **Project performance:** Is the project proceeding smoothly, or are you running into some obstacles you weren't expecting?

» **Quality:** Sure, the crew is hitting their milestones, but is the work up to the quality that you want at this stage?

To stay on top of your construction project schedule, maintain accurate records to analyze progress and decide course corrections. Keep our documentation tracker template handy to track all project documentation and deliverables.

### STEP #5: CLOSE OUT AND EVALUATE THE PROJECT

Just because the building is constructed doesn't mean you're done with the planning process. The lessons learned and data gathered from this project will help inform how you approach your next project, so it's important to perform the close-out tasks. This work can also serve as some of the pre-construction planning for your next project.

Thanks to the fact that you had a clearly-defined construction project plan and a way to track performance and obstacles, you're well-equipped to conduct an even more successful construction planning process the next time around. You'll know where the obstacles are and what mistakes were made, which will then inform how you can tweak the next construction plan to maximize success.

But this shouldn't be a process that takes place just in your head. Call a final meeting with your crew to discuss how you performed. Conduct a brainstorming session to get ideas on what you could have done better, and take extensive notes. Your team is your eyes and ears, so don't lose the opportunity to collect their valuable insight.

To formally close the project, create the actual project budget and contrast it with the original budget and then draft the final project report to share with key stakeholders.

## Start Working on Your Next Construction Project Plan

Now's the time to fix your construction planning process to keep your next project on time and budget. And it's a lot easier to do than you think. Here are a few simple steps to improve how you run your construction projects:

» **Evaluate your current construction software.** Does it offer the features discussed above? If not, it may be time to start examining options that do. Compare solutions and read user reviews, or check out construction software buyers guides for more help.

» **Create a mock project initiation document, and ask yourself some questions:** Have I been going into this level of detail before a project? How can it help me? How can I incorporate this into my next project?

» **Examine your current work schedule.** Where can you schedule time to conduct an extensive planning process that incorporates all of these steps? Be intentional and carve out some time to do it because it's very easy to allow your time to get swallowed up by day-to-day tasks or emergencies.

## About the Author

Shubham Gupta is a writer at Software Advice, covering project management and advertising with a focus on emerging small business trends. He believes in ideating and creating purpose-driven content to help businesses succeed. As part of the content space since 2016, Shubham has written about education, technology, lifestyle, human interest, and social relevance.

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## About the Article

Originally published in Software Advice online. With a goal of bringing more insights and better quality to customers, in 2014 the company joined forces with Gartner, the world's leader in IT research and advisory services, and Software Advice has helped more than 600,000 people find the top software options for their companies.