



## 1-PAGE PROJECT PLANNER

We've used lots of project planning tools, some pretty complicated. We needed a simple tool we could use for 90% of our projects. The 1-Page Project Planner and the Center's training has reduced project errors and conflicts and let us develop a common language that makes everything go much more smoothly. - Brian Wagner, Senior Project Manager, TASC

### Introduction

People resist planning; they want to "just get to work." Even with the Center's support, it's hard to get people to agree on a plan, but 4 hours of planning can save 400 hours of frustrating reinvention *and* let everyone succeed together on something big. It's tough to stick to one page, but the discipline is critical: it compels everyone to be concise and focused on essentials.

<b>Project name:</b> Run three focus groups			
<b>Primary goal:</b> Learn top 3 likes and 3 dislikes of core products			
Secondary goals			
1. Goal 2.2: Increase Net Promoter Score from 7.8 to 9.0			
2. Goal 3.2: Reduce SKUs from 150 to 125			
3. Goal 6.3: Reduce Sales Costs from 4.5% to 3.0%			
<b>Metric(s)</b>	Net Promoter Score	<b>Deadline</b>	August 31, 2018
<b>SITUATION</b>		<b>TEAM</b>	
<b>Division</b>	Commercial Products	<b>Supervisor</b>	Joan (CEO)
<b>Unit</b>	Widgets	<b>Manager</b>	Tim (VP Marketing)
<b>Department</b>	Marketing and sales	<b>Team</b>	Bert (analyst), Jane (sales)
<b>Location</b>	Chicago, IL USA		
<b>TASKS</b>		<b>RESOURCES</b>	<b>DURAT</b>
<input type="checkbox"/> The team began by studying definitions and best practices.		<b>Lead</b>	<b>Budget</b> <b>Spent</b> <b>Hour</b>
1.	Plan (initial): Establish questionnaire with consultant	Bert	\$1,500 \$1,250 10
2.	Plan (final): Select internal facilitator, venue and panel	Bert	\$1,000 \$1,565 12
3.	Win approval: Get budget approval if over \$10,000	Bert	\$0 \$0 1
4.	Kick off: Establish schedule (minimal)	Marv	\$1,000 \$0 1

### Benefits

The Center's tools minimize omissions, improve communications and foster collaboration. The **Project Planner**:

- Clarify delegation and accountability
- Encourage prioritization and brevity
- Simplify reporting to board, managers and staff

**Difficulty** Challenging  
**Estimated time required** 6-10 hours with the team  
**Special skills** Estimating, scheduling

### Instructions (see details next page)

A common mistake is to jump ahead to assigning tasks before getting firm agreement on goals and management concepts. Plan to run through two iterations.

1. **Prepare:** The PM must pick just the right people and perspectives.
2. **Align:** Make sure everyone agrees on terms, concepts and goals.
3. **Set the tasks:** Brainstorm to fit the categories provided. Distill to ten.
4. **Refine:** Set realistic durations and budgets. Iterate with the tasks.
5. **Kick-off:** Start, adjust, learn, adjust. In the end, celebrate success!

Members can contact the Center for assistance: [info@theindex.net](mailto:info@theindex.net)

### Make It Better

Member should share ideas for improving any of the Center's tools and how they're taught and formatted. It's also great to suggest new applications or brand-new tools.



## First time vs. big team

If your team hasn't done this kind of work before, you might spend more time on Meetings 0 and 1. If your team is big and has a lot of experience, you might need more time agreeing on the tasks in Meetings 2 and 3.

## Project planning details

- Meeting 0: Prepare (Manager)**
  - Study the Terms and Best Practices at the GM's Index of Terms
  - Study the 3 Good Questions and Recommended Resources
  - Identify likely **TEAM** members
  - Set up file and communications management
  
- Meeting 1: Align the team**
  - Agree on definitions and terminology
  - Discuss the Recommended Resources
  - Explore different opinions and experiences
  - Brainstorm and distill all your questions. See the charming poem
  - Draft the **GOALS** and **METRICS** and define the **SITUATION**
  - Enter the **DELEGATION** information. Adjust the team if needed
  
- Meeting 2: Set the tasks**
  - Brainstorm tasks in the categories provided. See Best Practice **TIPS**
  - Distill into at most 10 **TOP TASKS**. Decide if a task is a sub-project
  - Assign **Lead** to each task
  - Determine *total* team **Hours** per task
  - Set **Due** dates
  - Estimate the **Budget** for each task
  - Sleep on it. Research budgets and tasks as needed
  
- Meeting 3: Refine**
  - Revise
  - Get senior manager feedback. Revise again, if needed
  - Win enthusiastic approval
  
- Kick off**
  - Establish the reporting schedule
  - Record **COMMENTS** and results
  - Recognize and celebrate success!

**Project name: Run three focus groups**

Revised: 23 April 2018

**Primary goal: Learn top 3 likes and 3 dislikes of core products**

**Secondary goals**

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<b>Unit</b>	Widgets	<b>Manager</b>	Tim (VP Marketing)
<b>Department</b>	Marketing and sales	<b>Team</b>	Bert (analyst), Jane (sales), Mary (social media)
<b>Location</b>	Chicago, IL USA		

TASKS		RESOURCES			DURATION		
		Lead	Budget	Spent	Hours	Due	Done
<input type="checkbox"/>	<i>The team began by studying definitions and best practices.</i>						
1.	Plan (initial): Establish questionnaire with consultant	Bert	\$1,500	\$1,250	100	01/31/18	01/31/18
2.	Plan (final): Select internal facilitator, venue and panel	Bert	\$1,000	\$1,565	120	02/28/18	03/05/18
3.	Win approval: Get budget approval if over \$10,000	Bert	\$0	\$0	16	03/31/18	04/15/18
4.	Kick off: Establish schedule (minimal)	Mary	\$1,000	\$0	16	04/15/18	
5.	Communicate: Coordinate with customer service survey	Mary	\$0	\$100	64	04/30/18	
6.	Execute (see Gantt details): Run group #1 and evaluate	Jane	\$2,000	\$0	80	04/30/18	
7.	Execute: Adjust, run groups #2 and #3	Jane	\$3,000	\$0	120	06/30/18	
8.	Execute: Summarize results. Review with consultant	Bert	\$1,500	\$0	32	07/31/18	
9.	Close out: Complete report, thank participants	Bert	\$1,500	\$0	32	08/31/18	
10.	Evaluate: Set and track decisions against goals	Tim	\$0	\$0	16	Fall	
		<b>Totals</b>	<b>\$11,500</b>	<b>\$2,915</b>	<b>596</b>		

**COMMENTS**

The CEO was briefed on progress last week. She offered to step into any renegotiation, should the team think it necessary. Initial vendor reaction was very positive—they appreciated the structure, fairness and opportunity to be part of the team.

**Results:**