PROJECT PLANNING



2023

The Miami Foundation
Miami Open for Business
Supported by Wells Fargo

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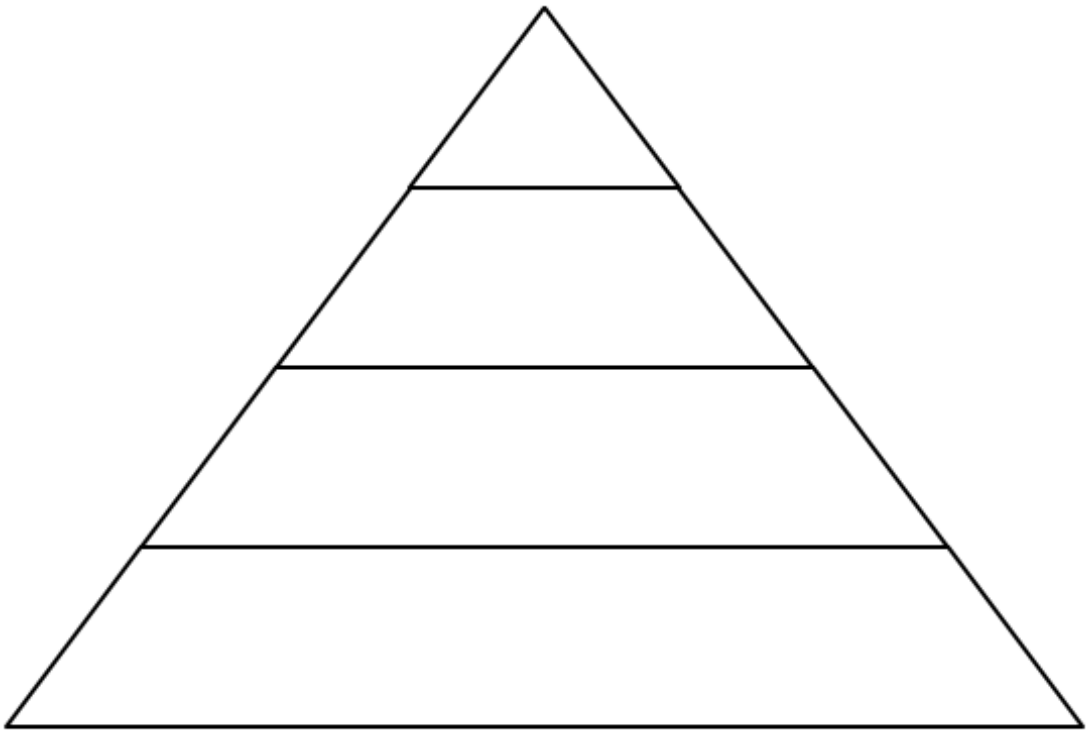
PROJECT PLANNING

PROJECT PLANNING PITFALLS

- Goals and desired impact are not clarified/agreed upon early on
- Lack of clarity regarding roles and responsibilities
- No clear timeline
- No regularly scheduled team check-ins

Notes:

THE PROJECT PLANNING PYRAMID OF GLORY



PROJECT PLANNING STEPS

ONE AT A TIME Follow these steps from start to finish when planning and executing a project.

STEP 1: Define project "Phases"

STEP 2: Identify "categories" that apply to your project.

STEP 3: List tasks within categories for Phase I

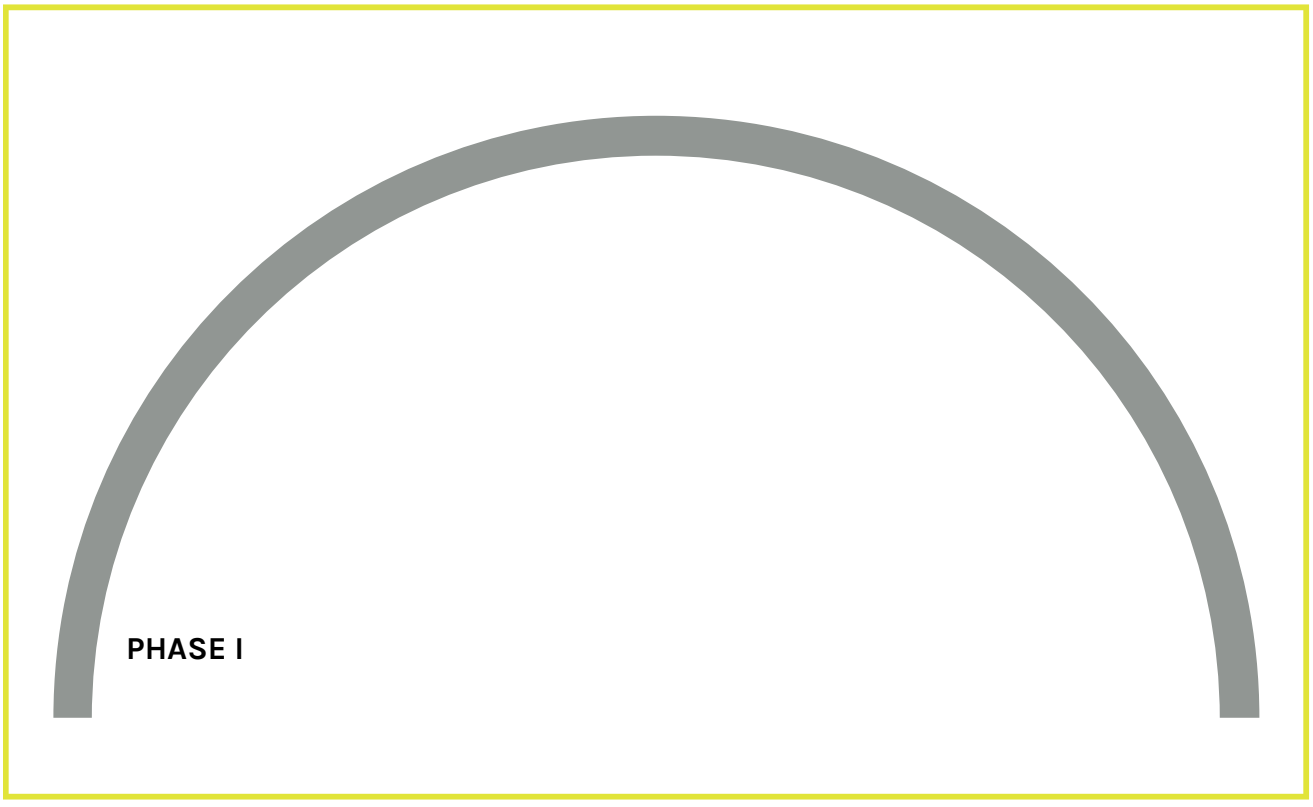
STEP 4: List tasks within categories for Phase II-?.

STEP 5: Assign responsibility (MOCHA).

STEP 6: Flesh out timeline.

STEP 7: Reflect & adjust.

STEP 1: DEFINE PROJECT "PHASES": Start with a planning phase and continue along the arc.



STEP 2: IDENTIFY "CATEGORIES" THAT APPLY TO YOUR PROJECT

EXAMPLES

- "The Big Picture"
- Recruitment & Selection
- Logistics
- Budget & Sponsorship
- Materials
- Communications

How will you categorize the tasks associated with your project?	
Category 1: Description:	Category 2: Description:
Category 3: Description:	Category 4: Description:
Category 5: Description:	Category 6: Description:
Category 7: Description:	Category 8: Description:

STEP 3: LIST TASKS WITHIN CATEGORIES FOR PHASE 1: PLANNING

REMINDER

- Start with a verb
- Aim for one level higher than super specific

CATEGORY	TASK
1._____	1.
	2.
	3.
	4.
	5.
2._____	1.
	2.
	3.
	4.
	5.
3._____	1.
	2.
	3.
	4.
	5.

STEP 4: IDENTIFY TASKS WITHIN CATEGORIES FOR REMAINING PHASES

STEP 5: ASSIGN RESPONSIBILITIES VIA "MOCHA"

M: Manager

O: Owner

C: Consulted

H: Helper

A: Accountable

STEP 6: FLESH OUT YOUR PROJECT'S TIMELINE

- Start with the big dates
- Identify how long key tasks will take
- Backwards plan from launch date
- Build in a contingency plan
- Fill in the timeline

STEP 7: REFLECT AND ADJUST

Take the time to ask the question: "Am I sure I'm thinking of everything?"

Do you need more or less time anywhere?

Do you need to re-categorize?

Is there something big you missed?

TEAM MANAGEMENT

TEAM CHECK-INS Create a shared document to serve as an agenda for your team check-ins.

- Use Google Docs to create and share the document digitally
- Include the Date, Attendees, and Resources/Links to review during the meeting
- Separate updates and questions by the categories you created
- Modify text styles or colors to differentiate between responses to questions or assignments of new responsibilities. Take notes in the document during your meeting
- Continue using the same document to track progress from the last check-in

DAILY TASKS There are many online task tools out there. Try out asana.com.

- Copy your project and categories into your project management software
- Break down "tasks" into a more granular to-do list
- Assign tasks and deadlines to team members
- Communicate about progress using the "Comments" feature

POST PROJECT REFLECTIONS

AFTER THE PROJECT WRAPS UP, ASK YOURSELF & YOUR TEAM: HOW DID IT GO?

- Where did I get the best bang for my buck on this project?
- What activities drove outcomes?
- Where/when did I need more time?
- Where did roles/responsibilities work out well?
- What new skills did team members develop during this project?
- What would I do differently next time?

Notes:

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