



## Ten Tips for Successful Project Planning

You've written the project proposal, presented your plan to the client and you've won the contract! Pat yourself on the back and then get to work – starting with these ten project planning tips. Although it can be labour intensive, robust planning will allow you to achieve the desired outcome, keep the project on time and on budget, and have a satisfied client.

Let's get started...

### 1. Draft your team

There's power in numbers, so don't try to do it alone. You can draw from a pool of talented specialists and vendors from your network to help you achieve success.

### 2. Hold a kick-off meeting

Bring together the client project team, consultants, vendors and support staff and hold a kick-off meeting. Your main objectives for this meeting should be to discuss the scope of the project, decide on roles and responsibilities and answer questions. You may have to brainstorm about project challenges or obstacles. Finally, and this is very important... kick-off meetings should result in individuals' 'buying in' to the project and their role in it, and get them excited about contributing to its success.

### 3. Be clear about what you want to achieve

Have clear goals and objectives for the project. Write them down and share them with your team so everyone understands what you're trying to achieve. Perhaps you need to transition a business process by a certain date – that's a goal. One objective in achieving that goal may be to have 100% of sales personnel trained on a new system by the launch date.

### 4. Draw a picture of the project

Draw a picture of the project by way of a spreadsheet or timeline. Use technology like Microsoft Project, Excel or Word tables to your advantage. Consider using main categories like *Responsibility*, *Due Date* and *Budget*. Break your timeline down into *Phases* with *Steps* below each phase. Finally, outline project *Milestones* (see Tip #5).

### 5. Recognize milestones

Milestones are specific points in time you use to evaluate progress. They're used to check if the project is still on schedule, within budget and whether or not your goals and objectives have changed. It's also a good time to check on the morale of your team – are there challenges you can help solve, are they still excited about the project and are they able to fulfill their responsibilities?

### 6. Keep your team up-to-date

Don't wait for milestones to keep your team up to date on progress. Use conference calls, meetings, email, and other tools to pass along information. Keep in mind that a change in one aspect of the project may be important to several members of your team. Although you don't want to overwhelm your team with information that doesn't apply to them, think about using weekly bulletins as an FYI that they can peruse when they have time. On the other hand, flag important information as just that – important, or needs their attention ASAP.

### 7. Have a contingency plan

Discuss a contingency plan with your team. Ask yourself these questions: Who will replace lost members of the team? What will we do if the timeline or budget changes? What will we do if the goals and objectives change? What will we do if the client feels the project is not going as planned?

## **8. Communicate, communicate, communicate**

By now, it's probably fairly clear, but worth emphasizing. You can enable project success if you communicate, communicate and communicate. Using the tips above, like project plans, milestones, and regular communication like weekly bulletins and conference calls will help make your job as project leader easier.

## **9. What if something goes wrong?**

As project lead, you must think about how you'll deal with challenges that arise or how you'll continue on if something does goes wrong. With experience, overcoming challenges becomes easier as you're better prepared to deal with a variety of situations. You'll want to consider problems with project goals and objectives, team morale, budget and timing.

## **10. Wrapping up**

Wrapping up is a time to celebrate the completion of a project, but it's also a good time to evaluate. Evaluation will be the topic for the final chapter in this series of articles. Stay tuned and good luck!

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### **Next month:**

**Evaluation** – The project is done, but before you sit back and celebrate, remember to evaluate. Learn how easy it can be and how to get feedback.