Quick GUIDE TO PROJECT PLANNING

We get it: You want to follow a process, but don't have time to read the long guide or watch the Class 05 video again. Plus, you've got the basics down!

So follow this quick guide—or better yet pin it to your office wall—and you'll always know the proper steps to follow and the right things to consider when planning your next big project.

THE
Art & Science
OF LEADING PROJECTS

teamgantt

STEP 1: RESEARCH & PREPLANNING

First, you want to truly understand the ins and outs of the project so you can determine the best process and identify the risks or issues that might be in your way.

CONDUCT YOUR OWN RESEARCH TO DIG DEEPER ON:

- Goals/outcomes
- Partnerships and outlying dependencies
- Potential issues and risks

SPECIFICALLY, BE SURE TO DISCUSS THESE THINGS WITH YOUR STAKEHOLDERS:

- Product ownership and the decision-making process
- Stakeholder interest/involvement levels
- Key outages, meetings, deadlines, and driving factors
- Related or similar projects, goals, and outcomes
- The best way to communicate with partners and stakeholders

AT THE SAME TIME, MAKE SURE YOU KNOW YOUR TEAM. GET TO KNOW THEIR:

- Expertise
- Interests
- Collaboration and communication styles
- Availability and workload

STEP 2: DRAFT YOUR PLAN

Sit down with a pen and paper or at a whiteboard, and outline how the project should work at a high level. Don't get too into the details yet. Think about:

- How your team prefers to work
- What deliverables will be helpful in getting the project approved
- How you will account for feedback and how many times you're willing (or scoped) to revise deliverables
- Who will be involved on the project and their other work
- When the project needs to be done or if there are any client-side deadlines or presentations that need to be made.

You have to consider this stuff to avoid surprises—or at least minimize them! And remember, you're doing this as a draft so you can use it as a conversation-starter with your team. It's not final!

When you can take those rough ideas and considerations to your team, it becomes an opportunity to invite discussion about what might work rather than simply dictating a process. It builds buy-in and allows the team to craft and own their parts of it. This method inspires process change and collaboration.

STEP 3: MOVE YOUR PLAN INTO TEAMGANTT

Finally, it's time to create your masterpiece in TeamGantt. It's super-simple to do, but there's a lot to remember. Here are a few quick reminders:

- Break tasks into sections or groups of tasks.
- Assign tasks to individuals or groups.
- Use notes to clarify tasks.
- Add dependencies between tasks that need to happen in a specific order.
- Double-check start and end dates.

Need a little help getting started? That's what our help docs are for! Use them for everything from getting started to deeper tasks like using reports.
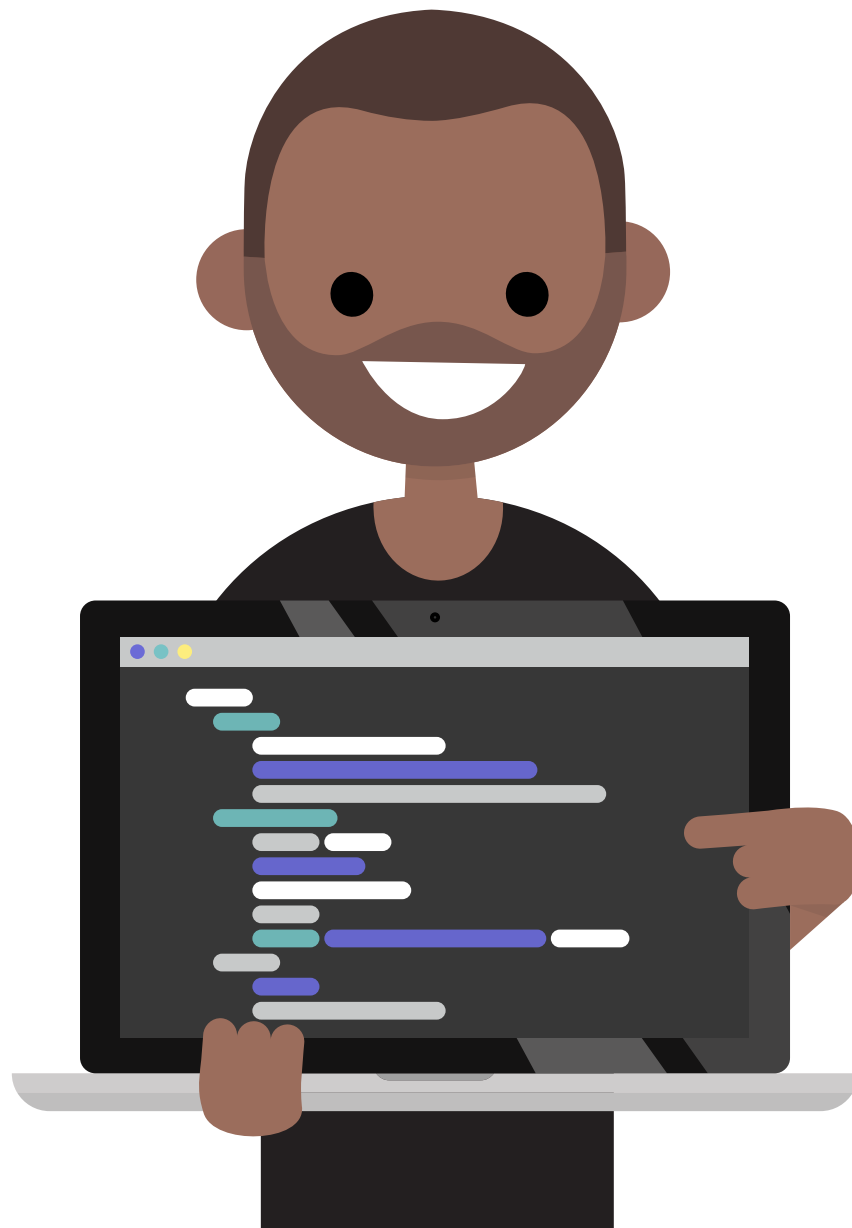
STEP 4: PRESENT & CONFIRM YOUR PLAN

Once you're done, you need to do your due diligence. It's easy to throw stuff in a plan—but you have to make sure you get it right.

Always review your final plan with your team before delivering it to stakeholders. Why? Because things like dates and tasks—and even assignments—will shift as you formalize that sketchy plan. Your team needs to know the reality of the plan as it stands after you've built it out in TeamGantt. And you want to be sure they're comfortable committing to the details. If they don't, things will quickly fall apart!

BE SURE TO DISCUSS:

- Review times
- Team work times
- Dependencies
- Time out/off, meetings, and milestones
- The final deadline
- Any assumptions you've made
- Major changes since your last talk

Once you've confirmed the plan with your team and have their full sign-off, you can confirm your plan and deliver it to your stakeholders. Remember, plans can be daunting. Be sure to make time to review your plan with stakeholders at a high level.

POINT OUT THINGS LIKE:

- Overall process and pacing
- Major deliverables and timing
- The time they'll have to review deliverables
- Overall timing for groups of tasks
- How far off you are from the deadline
- Wiggle room on the final deadline

If a stakeholder is more interested in the day-to-day, walk them through the plan line-by-line—but always remember that reading (and sometimes even following) a plan you did not create can get confusing. If you think your stakeholder's eyes will glaze over, start by just explaining overall sections or phases, and be sure to come back to your plan at intervals throughout the project to remind them of tasks, next steps, and overall progress.

STEP 5: MANAGE & UPDATE

Finally, keep in mind that project plans are living documents. Projects change constantly, and someone has to stay on top of—and document—that change. As things change, remember to:

- Make regular updates on progress and changes
- Communicate changes to your team, partners, and stakeholders
- Monitor and communicate risks

KEEP BETTER TRACK OF YOUR PROJECTS WITH

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Plans are simple to create and manage in TeamGantt! In fact, our customers run projects of all types using various methodologies, and TeamGantt helps them keep the details straight.

Here are just a few ways TeamGantt can make managing projects a breeze for you:

- **Plan faster.** Get up and running quickly, and share online plan drafts with your team to get quick buy-in and longer-term accountability.

- **Manage sprints.** By using our new boards feature or the TeamGantt Power-up for Trello, you can manage user stories or tasks within sprints.

- **Untangle project complexity.** With TeamGantt, you can view and share gantt charts with ease and ensure everyone has a full-picture view of your projects.

- **Make change easy.** Update your gantt chart in real time by simply dragging and dropping tasks that need to be rescheduled.

- **Easy team collaboration.** TeamGantt is your one-stop project hub for your team and stakeholders. You can schedule and track tasks, share documents, post notes and comments, plan and review team availability, and even estimate and track time all in one place.

- **Review progress in one click.** Check in on the task level to make sure things are moving along or to let someone know a task is coming due. Or generate overall project health and time reports to keep a constant finger on the pulse of your projects.