In your Project Charter, you already identified your project's phases/milestones. Now you will want to list as many anticipated activities and tasks as possible to develop a project plan. This will be essential for assigning and monitoring tasks, managing due dates, and making the progress transparent to everyone on the project team. Consult with the team members and try to develop a starting point that lists everything you can think of.

You can also create a basic project plan in Excel as shown below. If you have project management software (Microsoft Project, Microsoft Planner, Asana, Monday.com, etc.), enter the work items in the app.

IMPORTANT! Your project plan is not static. Expect it to change over the course of your project. As additional tasks and activities are identified, be sure to add and track them.

### Tips for creating a project plan in Excel:

- Number your phases so they appear ordered when you sort/filter.
- Use column filters to view information (filter by phase, by owner, by status, by due date).
- Starting an item with a verb can help clarify the task.
- Set up the spreadsheet as a shared doc and encourage team members to add and update their own items.
- Set reasonable and realistic due dates when establishing your plan.
- Limit your statuses to a few and be consistent in their use.

### Examples of Phases in IT Projects:

1. Discovery or Planning (Requirements, Analysis, Communication, etc.)
2. Design
3. Development or Build
4. Testing (include UAT and Sign Off, as needed)
5. Training
6. Pre-Go Live Activities (include Communication)
7. Go Live / Implementation
8. Post-Go Live (include Support, as needed)
9. Closure (Lessons Learned, Surveys, Final Report, Celebration, etc.)

This list is not meant to be all inclusive and not every phase may be needed.

### Examples of Statuses:

- Working on it
- Stuck
- Done
- [Blank] = Not started
If you have project management software (Microsoft Project, Microsoft Planner, Asana, Monday.com, etc.), enter the work items in the app.

### Sample Project Plan Using Project Management Software

<table>
<thead>
<tr>
<th>ServiceNow Education for SDCOE Employees Pr...</th>
<th>Subitems</th>
<th>Subitems Status</th>
<th>Responsible</th>
<th>Status</th>
<th>Activity Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Subitems
- Obtain from Tyler the Top 5 Requests and Top 5 Incidents
- Test entry of the top requests and incidents
- Meet with Uyen and John V. to talk about ServiceNow
- Work with John V. to determine who will conduct the training meeting with Admin Assistants
- Meet with Terry to review Project Charter
- Meet with Tyler, Flora, Candace, John V. to introduce the project

<table>
<thead>
<tr>
<th>Subitems</th>
<th>Status</th>
<th>Due Date</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Obtain from Tyler the Top 5 Requests and Top 5 Incidents</td>
<td>Done</td>
<td>Mar 10, 2021</td>
<td></td>
</tr>
<tr>
<td>Test entry of the top requests and incidents</td>
<td>Done</td>
<td>Mar 10, 2021</td>
<td></td>
</tr>
<tr>
<td>Meet with Uyen and John V. to talk about ServiceNow</td>
<td>Done</td>
<td>Mar 10, 2021</td>
<td></td>
</tr>
<tr>
<td>Work with John V. to determine who will conduct the training meeting with Admin Assistants</td>
<td>Done</td>
<td>Mar 10, 2021</td>
<td></td>
</tr>
<tr>
<td>Meet with Terry to review Project Charter</td>
<td>Done</td>
<td>Mar 10, 2021</td>
<td></td>
</tr>
<tr>
<td>Meet with Tyler, Flora, Candace, John V. to introduce the project</td>
<td>Done</td>
<td>Mar 10, 2021</td>
<td></td>
</tr>
</tbody>
</table>

#### Tips for creating a project plan in Monday.com:

- **Items (Parent level):**
  a. Name: Enter the major milestones, phases, or however you have organized the work. Examples: Planning, Prep, Execution, Closure
  b. Responsible: Enter the person(s) responsible for the parent level item
  c. Status: This is to mark the status of the entire phase and its subitems
  d. Activity Timeline: Enter the date range of the phase. All subitem due dates should fall within the activity timeline.

- **Subitems (Children):** For each item, enter all of the subitems. These are the activities that occur during the phase. Click the # in the Subitem column to expand the subitems. At minimum, enter:
  a. Task/activity name
  b. Status
  c. Due Date
  d. Owner

- **Comments:** For items and subitems, click the talk bubble to enter any comments/notes for the items or subitems.
  a. By default, all persons listed as Responsible will automatically receive an email with the comment. Use @mention to notify someone who is not listed as Responsible.
  b. @mention: Type the @ sign and the person’s name to notify that person
  c. Like: Click “Like” to show you’ve seen the comment
  d. Reply: Type a reply on a comment as needed