

PROJECT MANAGEMENT TOOLKIT

Tips for Creating a Project Plan

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.

Sample Project Plan in Excel

Phase	Item	Owner(s)	Due Date	Status
1. Planning	Obtain from Tyler the Top 5 Requests and Top 5 Incidents	Peyri Herrera	3/16/2021	Done
1. Planning	Test entry of the top requests and incidents	Peyri Herrera	3/16/2021	Done
1. Planning	Meet with Uyen and John V. to talk about ServiceNow	Peyri Herrera	3/16/2021	Done
1. Planning	Work with John V. to determine who will conduct the training meeting with Admin Assistants	Peyri Herrera	3/18/2021	Done
1. Planning	Meet with Terry to review Project Charter	Peyri Herrera	3/18/2021	Done
1. Planning	Meet with Tyler, Flora, Candace, John V. to introduce the project	Peyri Herrera	3/19/2021	Done
2. Prep - Materials Creation	Collect feedback from 16 Admin Assistants	Peyri Herrera, Candace Wong	3/26/2021	Done
2. Prep - Materials Creation	Obtain from John V. the dropdown list of incidents that SDCOE staff can choose from (Work	Peyri Herrera	3/29/2021	Done
2. Prep - Materials Creation	Determine if the "I am having trouble with" search box can be a Contains search instead of f	Peyri Herrera	3/29/2021	Done
2. Prep - Materials Creation	Create job aid	Peyri Herrera, Candace Wong	4/12/2021	Done
2. Prep - Materials Creation	Create video	Peyri Herrera	4/12/2021	Done
2. Prep - Materials Creation	Review and sign off on materials	Peyri Herrera	4/13/2021	Done
2. Prep - Materials Creation	Post materials on Common Ground	Peyri Herrera, Candace Wong	4/13/2021	Done
2. Prep - Materials Creation	Create PPT that will be used as part of the short instructional video and ServiceNow Trainin	Peyri Herrera	4/13/2021	Done
2. Prep - Materials Creation	Provide Susana with the recorded training meeting video to post on Common Ground	Candace Wong	4/20/2021	Done
3. Prep - Scheduling and Communications	Inform ITS Senior Leadership of the project plan - via email and at ITS Leadership Team Me	Peyri Herrera	3/22/2021	Done
3. Prep - Scheduling and Communications	Schedule and conduct Teams meeting with CSS to inform them of the effort	Tyler Petro	3/23/2021	Done
3. Prep - Scheduling and Communications	Set up spreadsheet to capture baseline metrics	Peyri Herrera, Candace Wong	3/23/2021	Done
3. Prep - Scheduling and Communications	Draft email to Executive Assistants, Admin Assistants, and Program Secretaries	Candace Wong	3/24/2021	Done
3. Prep - Scheduling and Communications	Set up spreadsheet of identified admin staff for training and review with Ewa	Candace Wong	3/24/2021	Done
3. Prep - Scheduling and Communications	Determine date/time and schedule Teams dry run AND training meeting with Admin Assiste	Candace Wong	3/26/2021	Done
3. Prep - Scheduling and Communications	Meet with Tyler, Flora, and Candace to review progress/discuss next steps for project	Peyri Herrera	3/26/2021	Done
3. Prep - Scheduling and Communications	Review draft email to assistants to introduce project and mention training meeting	Peyri Herrera	3/29/2021	Done
3. Prep - Scheduling and Communications	Request from Leo that at future New Hire Orientations that ITS can play the 2-minute video a	Peyri Herrera	3/30/2021	Stuck
3. Prep - Scheduling and Communications	Send formal invite from Peyri's calendar for training meeting with assistants	Candace Wong	3/30/2021	Done

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:



[Blank] = Not started

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Sample Project Plan Using Project Management Software

ServiceNow Education for SDCOE Employees Pr...	Subitems	Subitems Status	Responsible	Status	Activity Timeline
Planning	6	Done	[User]	Done	Mar 1 - 19
Subitems					
				Status	Due Date
					Owner
Obtain from Tyler the Top 5 Requests and Top 5 Incidents		Done	[User]	Done	Mar 16, 2021
Test entry of the top requests and incidents		Done	[User]	Done	Mar 16, 2021
Meet with Uyen and John V. to talk about ServiceNow		Done	[User]	Done	Mar 16, 2021
Work with John V. to determine who will conduct the training meeting with Admin Assistants		Done	[User]	Done	Mar 16, 2021
Meet with Terry to review Project Charter		Done	[User]	Done	Mar 16, 2021
Meet with Tyler, Flora, Candace, John V. to introduce the project		Done	[User]	Done	Mar 19, 2021
Prep - Materials Creation	9	Done	[User]	Done	Mar 22 - Apr 20
Prep - Scheduling and Communications	18	Done	[User] +2	Done	Mar 22 - Apr 19
Execution - Education and Communications	7	Done	[User]	Done	Apr 14 - 30
Closure	15	Done	[User]	Done	Apr 27 - Aug 3
			[User] +3	Done	Mar 1 - Aug 3

Tips for creating a project plan in Monday.com:

- Items (Parent level):**
 - Name: Enter the major milestones, phases, or however you have organized the work. Examples: Planning, Prep, Execution, Closure
 - Responsible: Enter the person(s) responsible for the parent level item
 - Status: This is to mark the status of the entire phase and its subitems
 - 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:
 - Task/activity name
 - Status
 - Due Date
 - Owner
- Comments:** For items and subitems, click the talk bubble to enter any comments/notes for the items or subitems.
 - 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.
 - @mention: Type the @ sign and the person's name to notify that person
 - Like: Click "Like" to show you've seen the comment
 - Reply: Type a reply on a comment as needed