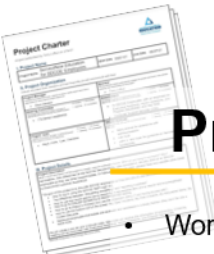



# PROJECT PLAN GUIDANCE

## What's the difference between the Project Charter and the Project Plan?

 <b>Project Charter</b>	 <b>Project Plan</b>
<ul style="list-style-type: none"> <li>• Word document</li> </ul>	<ul style="list-style-type: none"> <li>• Project management (PM) software</li> <li>• Excel or Google Sheets are useful if you don't have PM software</li> </ul>
<ul style="list-style-type: none"> <li>• Created <i>before</i> the work begins</li> </ul>	<ul style="list-style-type: none"> <li>• Set up <i>after</i> the Project Charter is authorized</li> </ul>
<ul style="list-style-type: none"> <li>• Part IV has a timeline and milestones</li> <li>• Example: <i>Training (4 weeks)</i></li> </ul>	<ul style="list-style-type: none"> <li>• Use Part IV to get specific details on tasks</li> <li>• Examples: <i>Identify training objectives, Write a training plan, Develop job aid, Conduct 2 training sessions, Evaluate</i></li> </ul>
<ul style="list-style-type: none"> <li>• Artifact – no need to modify it after receiving authorization</li> </ul>	<ul style="list-style-type: none"> <li>• “Living, breathing” plan that evolves</li> <li>• <b>Everyone: ADD NEW TASKS, ADJUST DATES, ADD NOTES/COMMENTS, COLOR CODE YOUR STATUS</b></li> </ul>

- The **Project Charter** sets the vision; is high level; is a snapshot in time; stored in a static Word document
- The **Project Plan** contains all the specific tasks (work to complete) for your project; it needs to be actionable, manageable, changeable; typically stored in software so you and the project team can best manage/track all the work

## To build a Project Plan, what should I do?

There are probably a lot of unknowns at this stage, as if you're putting together a puzzle but you don't know what the puzzle box cover looks like. To work toward a Project Plan, you'll want to identify:

1. What are the “buckets of work” (phases)?
2. What are the tasks for each bucket, and how long will they take?
3. How does all of this plot out on a calendar?

# 1. Identify the “buckets of work” (phases).

The “buckets of work” are your project’s phases and milestones. Use the list you put in your Project Charter (Part IV. Project Schedule & Milestones).

Example:

IV. Project Schedule & Milestones			
<i>Based on your needs, list either the phases and/or major milestones of the projects. Include start and end dates.</i>			
Phase/Major Milestone	Responsible (Lead)	Start Date or Month Begin	End Date or Month End
1. DISCOVERY / RESEARCH (11 weeks)		FEB 2025	APR 2025
2. SELECT SOFTWARE / RFP? / DEMOS (13 weeks)		APR 2025	JULY 2025
3. PURCHASING (~10 weeks)		JULY 2025	SEP 2025
4. CONFIG / SET UP SOFTWARE (8 weeks)		OCT 2025	NOV 2025
5. TESTING - INTERNAL / USER TESTING (5 weeks)		DEC 2025	JAN 2026
6. PILOT w/ 40 MBRS (15 weeks)		JAN 2026	APR 2026
7. TRAINING - DEVELOP / CONDUCT (16 weeks)		MAR 2026	JUN 2026
8. GO LIVE 7/1/2026 ★		JULY 2026	
9. SUPPORT - TECHNICAL / HUMAN / CHANGE / COACHING		JULY 2026	SEPT 2026
10. CLOSURE (4 weeks)		OCT 2026	OCT 2026

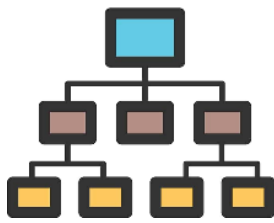
Before you proceed...Please note that can do #2 and #3 in the order that works best for you, or do them simultaneously. Remember, you’re putting together a puzzle!

## 2. Identify the tasks for each “bucket”, and how long they will take (project schedule).

Your goal is to figure out as much of the work as you can so you can come up with a reasonable schedule. It’s not always clear or easy to know at this stage what all of the tasks will be, so ask your project team and anyone else doing the work. You also might want to consult a generative AI tool to see if it helps generate ideas for tasks (and it might come up with things that are beneficial that you hadn’t thought of). Here are

### STEPS TO ESTABLISH A PROJECT SCHEDULE

- 1. Define your project.** If you already wrote a Project Charter, then you’re done. At this step you want to know the scope, deliverables, stakeholders, and general timeline for your project.
- 2. Identify tasks by creating a Work Breakdown Structure (WBS).** Break the project down into **a list or diagram** that represents everything the project must accomplish. A Work Breakdown Structure (WBS) is commonly used to assist in this process.
  - RECOMMENDATION: Use <https://app.diagrams.net/> to create a WBS (similar to Visio, free, requires no login). Here are the steps:



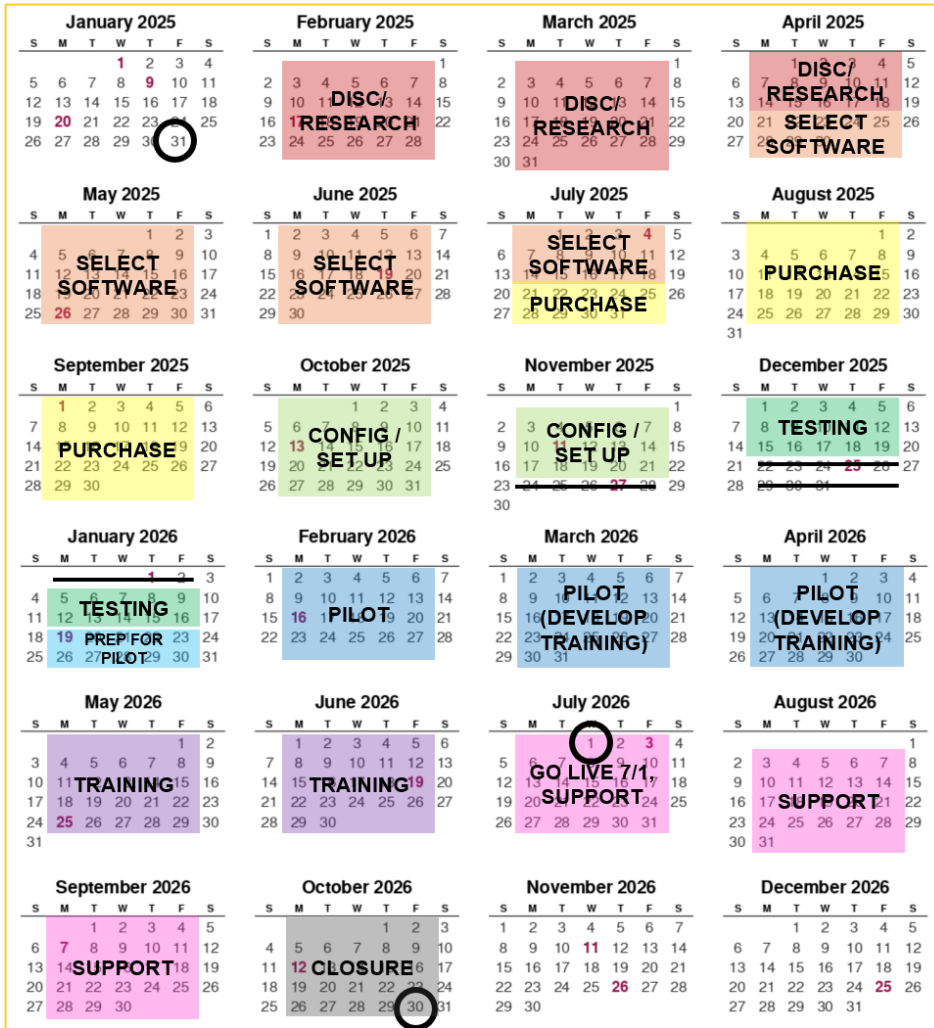
1. Go to <https://app.diagrams.net/>
2. Click ... (top right)
3. File > New
4. Search for “breakdown” (top left)
5. Select the template and hit Create
6. Double-click a square to change the text
7. Start by identifying all top-level key deliverables or phases, then work your way down each lane

- 3. Estimate durations.** Estimate the amount of time that each task is expected to take. Three-Point Estimation is often used to provide realistic values. Don’t forget to set a Schedule Reserve to accommodate unexpected delays.
- 4. Identify dependencies.** Determine which tasks are reliant on others. Dependencies can be Finish to Start, Start to Start, Finish to Finish, or Start to Finish.
- 5. Sequence tasks.** Define the logical sequence of the work to be done. A Project Network Diagram may help to visualize, especially on a compressed timeline with several tasks occurring simultaneously.
- 6. Assign resources.** Assign people, equipment, materials, physical space, and other resources to the tasks. Be wary of over-relying on one resource and consider that outside resources may have additional constraints.
- 7. Set due dates.** Set realistic due dates for milestones and deliverables.
- 8. Review.** Review the whole schedule. Look for gaps or conflicts, make sure resources aren’t overextended, identify risks, take note of action items, and plan for potential delays.

### 3. Plot out the project on a color-coded calendar (project schedule).

A simple color-coded calendar helps communicate your project schedule in a visual way, and using a calendar as you're figuring out phase durations might help you better plan around holidays, breaks, and other events.

Sample:



#### STEPS TO CREATE A COLOR-CODED CALENDAR

1. Generate a calendar with the range of months for your project. RECOMMENDATION: Use [Timeanddate.com](https://timeanddate.com) “Yearly” format (free, requires no login).
2. Either print (if you’re going to mark it up by hand) or paste the calendar into PowerPoint (recommended) or a draw tool. PowerPoint allows you to easily move elements that you lay down (circles, lines, boxes).
3. Circle your key dates. Examples: Start date, end date, target go live.
4. Use lines to strike through any days or weeks that project work will not occur. Examples: Thanksgiving Break, Winter Break, holidays.
5. Color code phases or groups of work. (This is where the WBS comes in handy to understand tasks and durations.)
6. Review the schedule.

# You are ready to turn your schedule into a Project Plan.

Now that you've got the schedule figured out and have identified numerous tasks, it's time to move into your Project Plan, the tool that will help you manage and track the work. You can use Excel, Sheets, or project management software.

View a short tutorial: [Project Plan Tips](#)

## Sample Project Plan in Excel

	A	B	C	D	E
1	Phase	Item	Owner(s)	Due Date	Status
2	1. Planning	Obtain from Tyler the Top 5 Requests and Top 5 Incidents	Peyri Herrera	3/16/2021	Done
3	1. Planning	Test entry of the top requests and incidents	Peyri Herrera	3/16/2021	Done
4	1. Planning	Meet with Uyen and John V. to talk about ServiceNow	Peyri Herrera	3/16/2021	Done
5	1. Planning	Work with John V. to determine who will conduct the training meeting with Admin Assistants	Peyri Herrera	3/18/2021	Done
6	1. Planning	Meet with Terry to review Project Charter	Peyri Herrera	3/18/2021	Done
7	1. Planning	Meet with Tyler, Flora, Candace, John V. to introduce the project	Peyri Herrera	3/19/2021	Done
8	2. Prep - Materials Creation	Collect feedback from 16 Admin Assistants	Peyri Herrera, Candace Wong	3/26/2021	Done
9	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
10	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
11	2. Prep - Materials Creation	Create job aid	Peyri Herrera, Candace Wong	4/12/2021	Done
12	2. Prep - Materials Creation	Create video	Peyri Herrera	4/12/2021	Done
13	2. Prep - Materials Creation	Review and sign off on materials	Peyri Herrera	4/13/2021	Done
14	2. Prep - Materials Creation	Post materials on Common Ground	Peyri Herrera, Candace Wong	4/13/2021	Done
15	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
16	2. Prep - Materials Creation	Provide Susana with the recorded training meeting video to post on Common Ground	Candace Wong	4/20/2021	Done
17	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
18	3. Prep - Scheduling and Communications	Schedule and conduct Teams meeting with CSS to inform them of the effort	Tyler Petro	3/23/2021	Done
19	3. Prep - Scheduling and Communications	Set up spreadsheet to capture baseline metrics	Peyri Herrera, Candace Wong	3/23/2021	Done
20	3. Prep - Scheduling and Communications	Draft email to Executive Assistants, Admin Assistants, and Program Secretaries	Candace Wong	3/24/2021	Done
21	3. Prep - Scheduling and Communications	Set up spreadsheet of identified admin staff for training and review with Ewa	Candace Wong	3/24/2021	Done
22	3. Prep - Scheduling and Communications	Determine date/time and schedule Teams dry run AND training meeting with Admin Assista	Candace Wong	3/26/2021	Done
23	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
24	3. Prep - Scheduling and Communications	Review draft email to assistants to introduce project and mention training meeting	Peyri Herrera	3/29/2021	Done
25	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

### TIPS FOR CREATING A PROJECT PLAN IN EXCEL/SHEETS:

- 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. Example:

Working on it
Stuck
Done

[Blank] = Not started

- **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 Project Management Software (Monday.com)

If you have project management software (Microsoft Project, Microsoft Planner, Asana, Monday.com, etc.), enter the work items in the app.

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