3. Project Management Toolkit: Plan the Project

Key Question

As we enter the Plan the Project phase of the project lifecycle, the project manager's work revolves around answering a singular question:

How do we divide and conquer the work to be done on this project?

Key Activities

There are four key activities that provide helpful structures for answering this question and laying a foundation for the remainder of the project. These are:

1. Develop a Project Roles Chart

2. Create a Gantt Chart
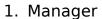
3. Hold a Kick-Off Meeting

4. Draft a Project Plan

This section will discuss each of these activities and the concepts they build upon.

Project Roles

During the initiate the project phase, the project manager defined the work that needs to be completed on this project through the completion of a logic model and

work breakdown structure. Now, to start addressing how do we divide and conquer this work, the project manager needs to define "we." Watch this short video to learn more about selecting your project team.

Who are the people who will be working on this project in some respect? For staffing this project, it is helpful to identify the types of roles people may serve in, which can vary from taking on large parts throughout the lifecycle of the project to only providing specialized expertise on discrete aspects of the project.

One way to conceptualize these roles is through the [MOCHA model](), which offers a tool for clearly delineating the roles of people on a project. MOCHA stands for the five types of roles:

1. Manager

2. Owner

3. Consulted

4. Helper

5. Approver

Manager

There is one manager of a project who holds the owner of the project accountable. This person is often the owner's supervisor. The manager serves as a resource to the owner by providing the owner feedback, asking clarifying questions, reviewing progress, and intervening if the project goes off track.

Owner

There is one owner of a project who is responsible for driving the project forward and serves in the role that we typically consider to be the "project manager" role. The main responsibilities of the owner are:

- Delivery of all the work

- Delegating work to helpers and consultants

- Creating and maintaining project planning and management tools

Consultant

A consultant is a person who is external to the organization and is brought in for specific skills or subject matter expertise. There may be many consultants who work on a project.

Helper

A helper is a person who is internal to the organization and brings specific skills to work on discrete deliverables. There may be many helpers who work on a project.

Approver

There is one approver, and this person is the one to sign off on the major decisions of a project. The approver may also be the owner or manager.

Identifying Needed Roles from Activities in Logic Model

The logic model will serve as the guide for identifying what staff and external support are needed to complete the work on the project. Based on a review of the activities in the logic model, the project manager will identify all specific skills and all subject matter expertise that will be needed to complete these activities. Using these defined areas of responsibility, the project manager will assign these to helpers and consultants.

Project Schedule

A project schedule is a list of all work that needs to be completed on a project with each activity's associated deadline for when it needs to be completed. Creating a schedule that is acceptable to all project stakeholders creates a strong foundation for the project.

Milestones

Project milestones are specific events over the course of the project that show an important achievement or completion of a major phase. They serve as natural points that demarcate distinct phases of the project, which provides order and organization that make completion of the work more manageable. Milestones also enable the project manager to have a big picture perspective about how groups of individual tasks culminate into project deliverables and provide a checkpoint to compare progress against the overall schedule.

Harnessing the power of milestones' delineation of specific phases of the project should also be utilized in the planning phases. Identifying the specific achievements over the course of the project enables a project manager to generate a list of activities and the respective completion dates.

Gantt Chart

A Gantt chart is a horizontal bar chart that visualizes the activities within a project to a schedule. Activities and tasks are identified on the vertical axis and the schedule is identified along the horizontal axis.

A project manager can superpower a project's Gantt chart to become a task management tool by color coding the bars to represent who is responsible for completing the task. The benefit of mapping scheduled tasks to staffing assignments is that it creates a sole source of truth that is viewable by all for defining responsibilities. It is not only helpful for onboarding people to a new project by introducing each person to respective responsibilities, but it also serves as an accountability tool. Other benefits include:

- Improves communication through explicit identification about tasks and associated deadlines

- Prevents bottlenecks in decision making and approval

- Prevents conflicts about task ownership

- Visualizes the distribution of work, thus enabling more equitable workloads

- Eases the pain points of turnover by facilitating onboarding of new people to the responsibilities of the role

Here are some best practices for developing the chart:

- First identify all the milestones and the respective deadlines

- Next identify the project tasks that are needed to reach the milestones

- Avoid adding tasks that are generic or administrative

- Align each task with a due date

- Each task should have at least one person assigned who is responsible for the work

- Do not overload any team members

Here is a Gantt Chart template that can be utilized in your project: [Sample Gantt Chart](#)

Creating a Foundation for Communication

A critical part of the Plan the Project phase is creating the foundation for communication. The Project Roles Chart and the Gantt Chart provide visual tools defining scope of responsibilities for everyone working on the project. These are important communication tools because they make each person's responsibilities transparent to all.

Project Communications Plan

A Project Communications Plan is another important aspect of this foundation that identifies what, when, and how information will be shared at key intervals. Creating this plan provides the project manager with a structure for communicating with stakeholders over the course of the project, which helps maintain stakeholder engagement and buy-in that is critical for completing any project.

Here is a Project Communications Plan template that can be utilized in your project: [Sample Project Communications Plan](#)

Closing Out the Plan the Project Phase

Project Plan

Once these project planning and management tools are developed, a helpful way to reference all these resources that will be utilized throughout the project is to create a Project Plan. A Project Plan is the central document for a project that identifies all the project planning and management tools being used. It serves as a checklist for quickly onboarding someone new to the project.

Here is a Project Plan template that can be used in your project: [Sample Project Plan](#)

Kick-Off Meeting

After the project manager has developed the project planning tools discussed in the Initiate the Project and Plan the Project phase, it is helpful to have a kick-off meeting to orient stakeholders to the project plan. Watch this video to learn more about kick-off meetings.

Here is an example agenda for a kick-off meeting: [Sample Kickoff Meeting Agenda](#)

Last updated on December 15, 2023.

Files

[PM Toolkit - Gantt Chart.xlsx](#)

[PM Toolkit - Project Communications Plan.xlsx](#)

[PM Toolkit - Project Plan.docx](#)

[PM Toolkit - Kickoff Agenda Template.docx](#)

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