

Project Planning Form

What are the deliverables?

What needs to be developed or produced, a report, presentation or a product?

Example: If a report the parameters need to be defined.

1. *What is the structure?*
 - a. *Problem, vision, strategy, tactics?*
2. *Length?*
 - a. *3 pages or 150 pages?*
3. *Hard or soft copy?*
 - a. *A physical report or a digital document?*

Example: If a product, one should ask the following questions:

1. *What size?*
2. *Weight?*
3. *Color?*
4. *Quantity?*

Example: If a presentation, questions such as format need to be asked.

1. *Will it be a PowerPoint presentation?*
2. *Lecture?*
3. *Press conference etc.*

Who do you report to?

Who is the deliverable being given to? Know your audience! Your product presentation will be different depending on the background, age group, and knowledge level of your audience.

What is the timeline?

The timeline should include all drafts, feedback and of course when the final draft is due. It is important to be clear on how many drafts and revisions will be included in this project. A consultant, contractor and especially an intern's nightmare is a project, compensated on product not hours, which seemingly never ends. Establish a guideline as to when a first draft is due and when you will receive a response. Clarify the dates for all drafts, feedback and revision until the final draft date. It may be necessary to be flexible on dates throughout the process, but there is no comparison between a project which starts with a clearly defined schedule and one which is open ended.

What resources are available?

Where can I gather appropriate information? Will there be a budget for this project? Who will be the point person if there are any questions during the project? When working for an organization it is important to clarify if one has access to files, employee's time for interviews, and if one can call other organizations noting that one is working on a project for the organization. If one needs supplies, a research document or to travel, will there be a budget to cover those costs? It is important to not only come up with a number and define what would be appropriate allocation of funds, but discuss the process of receiving those funds if needed. Regardless of how much time and preparation goes into the initial discussion of expectations, there will always be something not discussed which comes up. Therefore, make sure to clarify who from the organization will be available for guidance, how they could be reached and confirm they are aware of your project and his or hers' status as your point person.