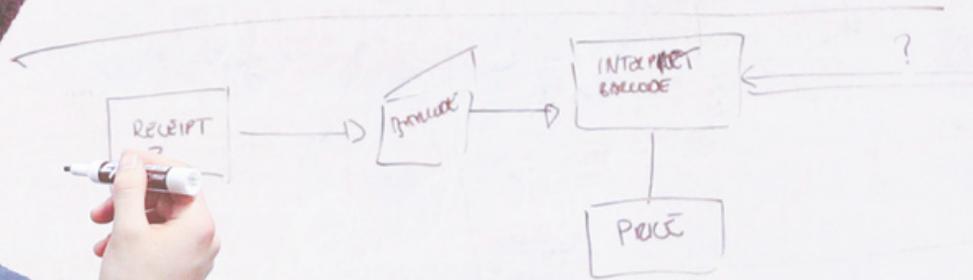
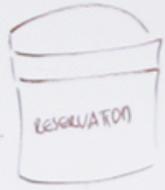


PROJECT *definition* GUIDE



Step-by-step process for organizing your change journey.

02

WHY USE A PROJECT FOR A CHANGE JOURNEY?

- If you want to make a change that requires a certain effort or analysis,
- If you've been stuck trying to figure out how to work on a change,
- If you've started and abandoned changes, and
- If you have to work in a team with stakeholders or people who do not report to you,

... project is the right tool to use.

A project is a way to accomplish a goal within a deadline, and it differs from everyday work or life because it has a beginning (the moment in which you start working on a goal) and an end (the moment in which you sustain the results you've achieved). Working on a project does not mean that you will necessarily have to dedicate all your time to it. Depending on your goal, time availability and resources, you can put more or less time into it.

The project offers a process to organize all the variables that influence the achievement of your goal and sequence your actions in the most efficient way. It helps you focus, lead change and get results.

*working
with deadlines*

03

CONFIRM YOUR GOAL

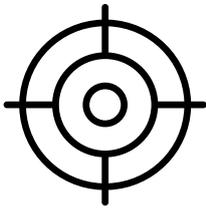
The first thing you need to do when you kick off a project is to confirm your goal. If you've used the SMART goal approach, reviewing your goal definition is relatively easy.

Make sure your goal is clear, you know how to measure your progress, you can dedicate resources, and you are comfortable with the time frame you've set up. Think about a title for your project. You will be working on it for a while, so come up with something motivating and easy to remember.

The project charter is the tool that summarizes the essence of your project: it includes the most important aspects to plan and follow when you are implementing your goal.

PROJECT CHARTER		<Your Name>	
<Project title>		KICK OFF DATE	<Date>
		PLANNED END DATE	<Date>
Goal: <your SMART goal>	Metrics/KPI's/Deliverables:		
Scope:	Stakeholders:		
Budget:	Suppliers:		
Team:	Risks:		
Smartsheet Tip → This is a form which focuses on creating a project summary including scope, time and budget			

SCOPE



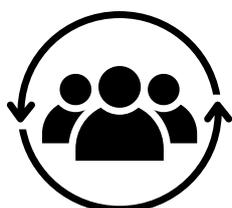
The scope refers to the extent of the work performed to deliver a result. When you define the scope of your project, think about the 'what' and 'why' of your change journey. What activities will you perform, which area will you cover, or which areas will you leave out, and why... You will have to brainstorm with your stakeholders (if you have any) to agree on the limit of the project. It is important to define how far your project extends in terms of activities, deliverables and time. More focused and specific is your scope, more chances of success. Less is more.

BUDGET



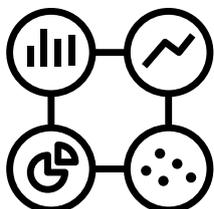
A budget is a financial plan for a defined period. In the case of a project, it is for the period the project lasts. The budget can include provisions for expenses and investments. When you work on your change, you need to plan a budget (unless you have limitless resources, which is unlikely) as it can be a constraint to your activities and achieving results. The lack of budget can slow you down, just like the lack of time. So, plan for it. For change journeys that require a high level of expenses or investment, budgeting must be agreed upon with stakeholders.

TEAMS



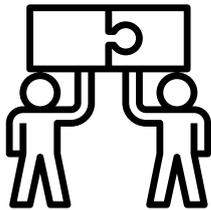
Teamwork is the essence of a project. It doesn't matter if the change you want is personal or linked to your business; you will probably work in a team with somebody. That could be your work team or your suppliers, external consultants, clients, family. So, if you work in a team, it is important to specify who is on that team and communicate with them, let them know about your project and the goal you are pursuing. Involve them in your planning as you will have to work together.

METRICS



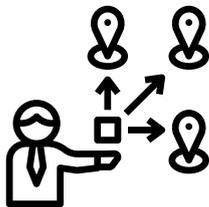
Metrics is about how you measure your progress. How will you know that you are moving forward? How will you know when you've achieved your goal? If you've worked with the SMART goal definition, you've already defined some measures. Now is the moment to further specify and state the frequency with which you will measure or conduct observations. It doesn't matter how intangible your goal might seem; you have to find a way to measure your progress. If not, you will get stuck.

STAKEHOLDERS



A stakeholder is any person who has a direct interest or is affected in some way by your project. It could be a partner, family, friends, neighbours, or even somebody you might not know yet, but you will probably meet due to your project activity. It could also be your boss but not necessarily because of the hierarchical relationship, but because of direct interdependence. Or, if you work in a big organization, managers or colleagues from other departments can be your stakeholders if the changes you are making affect their areas or scope of work.

SUPPLIERS



Suppliers are important to identify upfront because your performance can depend on their delivery. To do that, you can conduct general research to understand the supply market of your interest for this project. It is commonly accepted best practice to select at least 3 suppliers to evaluate and compare costs and quality, delivery times, post-sales service, and claims handling. Sometimes when you are not very familiar with the product or service you need, studying suppliers is how to learn about the market.

RISKS



Once you have outlined and described all components of a project charter, you have to identify the potential risks you might face while working on your goal. Risks are those unpleasant events that can handicap a project. Some risks are difficult to avoid or mitigate, and they can seriously slow down your project. For example, an unexpected accident, flooding, a new disruptive technology, supplier bankruptcy. Others are foreseeable, and you can put a backup plan in place to deal with them. Examples can be: server downtime for maintenance, change in fashion trend, delay in supplier lead time, overbooking, excess of orders placed for your product, etc. You have to plan resources and activities to minimize, monitor and control the probability of one or more of those risks happening. If you plan, you will be able to minimize the risks and even prevent them.

IN SUMMARY...

Project is a framework, a process that will take you from point A to point B. Remember, it is a temporary and non-repeatable endeavour, and it implies change. It wraps up all the bits and parts of your transformation and gives you control to accomplish your goal.

“Every project has challenges, and every project has its rewards.”

Stephen Schwartz