

**MAKE IT
HAPPEN!**



STUDENT PROJECT PLANNING HANDBOOK



PROJECT PLANNING CHECKLIST

Step by step, this handbook will help you plan your project, making sure you're thinking about the right things at the right time. Use this checklist to keep track of where you're at and what comes next:

Phase 1: Build your team (tools and templates on pages 3-4)

- ☐ Recruit candidates with a good mix of skills
- ☐ Assign roles and responsibilities that put those skills to good use

Phase 2: Develop your ideas (tools and templates on pages 5-6)

- ☐ Write a Business Case that sets out what you want to do, and how you intend to do it
- ☐ Visualise what success looks like and set out some KPIs (Key Performance Indicators)

Phase 3: Plan out your project (tools and templates on pages 7-12)

- ☐ Estimate how long it will take to plan your project, and how much it will cost
- ☐ Decide what you can (and can't do) given your resources
- ☐ Identify any risks to your project and minimise them
- ☐ Create a project schedule so you don't miss any important deadlines
- ☐ Ensure everyone is doing what they should be doing
- ☐ Keep track of your spending using a project budget
- ☐ Make sure people know about your project using our publicity tips

Phase 4: Make it happen! (tools and templates on pages 13)

- ☐ Monitor what's going on to make sure you follow your project plans
- ☐ Manage any issues or problems as they arise and stay in control

Phase 5: Reflect and review (tools and templates on page 14)

- ☐ Reflect on the positives and negatives so you can learn from your project to improve for the future
- ☐ Update your CV with your new project planning experiences and skills

While you're gathering your team, it's worth thinking about what each person brings to the table. Use this **Skills Map** to help you think about who you could recruit to make sure your team has a good mix of talent and skills.

| Skills | Characteristics | Ideally suited to the role of... | Who do I know that is great at this? |
|----------------------------|---|---|--------------------------------------|
| Leadership | Confidently communicate a vision to bring everyone together and inspire them to make your project a success. Take on board the views of others, but ultimately make decisions by weighing up the benefits, costs and risks. | Project Manager | |
| Conflict management | Spot potential conflict and address it before it affects the success of your project. This might be checking the project is on track according to your timing plan or budget or smoothing over differences in opinions over what should be included or not. A level head is a must. | Project Manager Project Coordinator | |
| Teamwork | Thrive on working together effectively to deliver your project on time, on budget and to a high quality. | Project Manager Project Coordinator | |
| Organisation | The ability to use your time, energy, resources, etc. in an effective way so that you achieve the things you want to achieve. | Project Manager Project Coordinator | |
| Negotiation | Manage a discussion between two parties to reach an agreement that strikes a balance between everyone's needs. | Project Manager Project Coordinator | |
| Communication | Can translate ideas into language that everyone understands to make messages simple and clear. Make sure that everyone receives and understands the information they need. | Communications Manager Project Coordinator | |
| Creativity | Has the ability to think without limits and has the initiative to form new and innovative ideas. They love getting their hands dirty and are not afraid to try new techniques to make something look (or sound) amazing! | Art Director | |
| Financial planning | Has the knowledge, skills, and confidence to manage their money well. Loves a bargain and is organised enough to keep track of not only their spending, but the spending of others. | Financial Manager | |

DREAM TEAM TEMPLATE

Who's hired then? Complete this table with your final project team choices. Use the spare rows to add in any specialist roles or responsibilities that are unique to your project.

| | |
|--|--|
| The sponsor Who are you doing the project for? | |
| The business Who is going to benefit from your project? | |
| The Project Manager | |
| The Project Coordinator | |
| The Financial Manager | |
| The Art Director | |
| The Communications Manager | |
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BUSINESS CASE TEMPLATE

PHASE 2 Develop your ideas

Use this to help you explain why your project idea is a good one and get your project sponsor on board with your ideas. See the **Project Planning Example** on **page 6** of the **Student Project Guide** for ideas on how to get started.

| Business Case | |
|---|--|
| What is your project? | |
| Why do you want to do it? | |
| Why are your stakeholders (your sponsor) going to be interested in your project? | |
| What are you going to do? | |
| How much will it cost? | |
| When are you going to work on the project? | |
| Who will do the work? | |
| What must you have to make your project work? | |
| What should you have: things that are desirable but not essential? | |
| What could you have: things that would be 'nice to have' if they don't affect anything else? | |
| What won't you have now but might like in the future if things change? | |
| How will you communicate your project? | |

KPIs: WHAT SUCCESS LOOKS LIKE

Visualise the final outcome being a complete success. Write down what you can see, hear, think, feel. What were the deciding factors that made it a success?

Write down goals (KPIs) you will measure success against and actions to help you achieve them. See the **Project Planning Example** on **page 8** of the **Student Project Guide** for ideas on how to get started.

Visualisation:

KPI:

Action:

Visualisation:

KPI:

Action:

Visualisation:

KPI:

Action:

PHASE 3

Plan out your project

Use the seven steps, and the **Project Planning Examples**, included in **page 9** of the **Student Project Guide**, to help you plan out your project:

Step 1 – Make some educated guesses

Estimate how long you'll need, and how much money you'll need, to deliver your project successfully.

Estimated timescale needed:

Based on

Estimated budget needed:

Based on



Step 2 – Scope your project, know your limits

Decide what needs to be done, and identify any limitations to make sure your team, and your project, stays on track. Think of this as your master 'To Do List' – deviate from this list at your own peril!

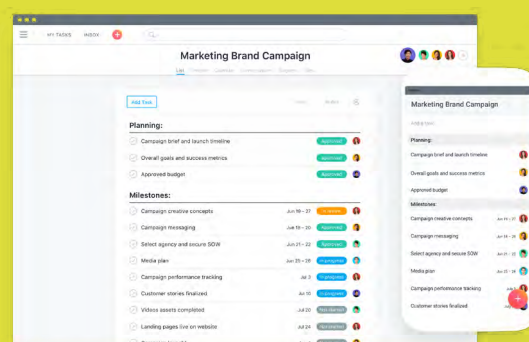
See the **Project Scoping Example** on **page 9** of the **Student Project Guide** for ideas on how to get started.

| Major tasks to be completed | Constraints, considerations or limitations |
|-----------------------------|--|
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Prefer digital?

Try **Asana**, a project management tool that lets you break projects down into sections and sub-lists, along with dashboards to see how much of the project has been completed already. You can add, rearrange, and complete tasks the same way you would in a to-do list app—but with the collaboration and organisation features you need to work as a team.

For your personal tasks, you can make extra lists in Asana that are shared with specific people. Your own assigned tasks will also show up in your *My Tasks* view for a quick way to see the things you need to take care of meaning you won't miss a deadline. Hurrah! **www.asana.com**



PHASE 3

Plan out your project

Step 3 – Identify any potential risks

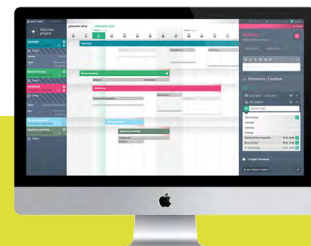
See the **Project Planning Example** on **page 10** of the **Student Project Guide** for ideas on how to get started.

| What might happen? | How likely is it to happen? | What might be the impact of it happening? | Who should 'own' the risk? | What action should the 'risk owner' take? |
|--------------------|-----------------------------|---|----------------------------|---|
| | | | | |
| | | | | |
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Step 4 – Create a schedule

You might want to use a spreadsheet, a calendar (Google Calendar can be shared) or even download a free Gantt chart template to plan your project. But, for now, record your key milestones here. See the **Project Schedule Example** on **page 11** of the **Student Project Guide** for ideas on how to get

| Milestone | Start date | Deadline |
|-----------|------------|----------|
| | | |
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Prefer digital?

Try **Agantty**. It's a simple and free project management app that lets you create Gantt charts with projects and tasks quickly, easily, and painlessly. Just add your projects, enter dates and deadlines, then add tasks to each project. Agantty displays them all on a timeline for you. Need to adjust dates? It's easy. Just drag the edges of a project or task left or right, and Agantty automatically updates the timeline and dates for you. The end result is a calendar that provides a visual of everything your team is working on.
www.agantty.com

Step 5 – Manage your resources

Use this template to plan out who is going to do what, and what resources will they have. Then make sure everyone knows what their roles and responsibilities are.

See the **Project Schedule Example** on **page 12** of the **Student Project Guide** for ideas on how to get started.

| Team member | Action | Resources | Deadline |
|-------------|--------|-----------|----------|
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Prefer digital?

There are lots of free project management apps available that help you delegate work and keep track of what people in your team are doing. You could try using **Trello** to help you keep your team organised. It's free to use, you can download the app onto your phone and it stays in sync across everyone's device. See how it works here www.trello.com



Or, if you want something that's a bit more familiar, use **WhatsApp**. It's fun and fast and everyone is already using it so they are less likely to miss an important message. You could set up WhatsApp groups for different areas or teams within your project and you can even set it up to work on your computer or laptop too, making it even easier to type longer messages <https://web.whatsapp.com/>



Step 6 – Monitor your budget

Don't know where to start? There are some good tips to get you started included here

<https://www.thebalancecareers.com/create-a-project-budget-2779550>

| | |
|-----------------------|-------|
| | Total |
| Overall budget agreed | |

| | Cost per item | Number of items | Total |
|--|---------------|-----------------|-------|
| Project delivery costs: List the items you will need for your project <i>e.g. A/V equipment, tickets, furniture (buy/rent), decorations, cinema food and drinks, props for awards ceremony, red carpet hire.</i> | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Publicity costs: List the costs associated with your chosen publicity method(s) <i>e.g. printing costs, paper, props and costumes for photo-shoot and teaser trailer production, postage costs for press releases.</i> | | | |
| | | | |
| | | | |
| | | | |

| | |
|---|-------|
| | Total |
| Overall expenditure (Total from each column) | |
| Overall profit (Overall budget minus Overall expenditure) | |

Prefer digital?



There are lots of simple project budgeting templates available online. Try finding one to use in Google Sheets. You can share your Google Sheets with the rest of the project team so they can see exactly how much is left in the project budget, and see any changes happening in real-time. Plus, you can set out the type of access you want each team member to have meaning your Financial Manager can edit it but your Communications Manager can only view it.

If you are new to Google Sheets, use this tutorial to brush up your skills <https://www.benlcollins.com/spreadsheets/how-to-use-google-sheets/> Then, you can find plenty of templates here to help you get started <https://www.smartsheet.com/free-google-docs-budget-templates-for-google-docs-google-sheets>

Step 7: Publicise your project

Use this template to plan how you will promote and publicise your project. See the advice and tips on **page 13** of the **Student Project Guide** for ideas on how to get started.

| Publicity method | Who is responsible? | How much will it cost? | Key deadlines | What will it achieve and how will it benefit the project? |
|------------------|---------------------|------------------------|---------------|---|
| | | | | |
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MANAGE THE ISSUES

PHASE 4

Make it happen!

Remember, risks are things that might happen, and issues are things that have happened. Keep an Issue log to make sure issues aren't forgotten, and to remind everyone what steps have been taken to resolve them. See the **Issue Log Example** on **page 15** of the **Student Project Guide** for ideas on how to get started.

| Issue | Steps taken | Issue resolved? |
|-------|-------------|-----------------|
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WRITE IT UP

Keep your sponsor happy by updating them with what's going on through a regular **project report**. Include the following:

1. Project progress, sharing any success stories.
2. Any issues the project is experiencing, and how you are dealing with them.
3. Potential risks to the remainder of the project and any help or support you may need.



PHASE 5

Reflect and review

POST-PROJECT REVIEW

Use this template to plan out who is going to do what, and what resources will they have. Then make sure everyone knows what their roles and responsibilities are.

See the **Post-Project Review Example** on **page 16** of the **Student Project Guide** for ideas on how to get started.

| | |
|--|---|
| What was positive about the planning of your project? | What was negative about the planning of your project? |
| What went well? What were the real successes? | Think about all the even better if... 's What would you differently in the future? |

The Association for Project Management (APM) is the chartered body for the project profession. We have over 26,000 individual members and 500 corporate members, making us the largest professional body of its kind in Europe.

If you're older than 16 and like the idea of working in the project profession, you can join APM as a Student member – for free. It's a great way to build your project knowledge, and network with project professionals. It doesn't matter what subjects you're studying or whether you plan to take an apprenticeship or go to university.

www.apm.org.uk/student



GOOD LUCK!