**Tool 5**

# Project Planner

Use this simple framing and planning tool to kick off your customer experience project by making considerations for the objectives of your intervention; the key customer experience improvement hypothesis you're testing; resource, material, and budget requirements; and your timeline. While it's important to plan adequately, customer experience work is by nature highly iterative and improvisational. The best type of planning helps define the key opportunity you're targeting. It's based on initial customer research and expectations for measurable outcomes, but leaves flexibility for testing and iteration along the way.

**PRO TIP –** *Make your planning process collaborative. Fill out the templates as a team and revise over 1-3 weeks, seeking consultation from external partners and cross-functional leadership. To stoke collaboration over time, make the project plan large and visible – inviting others to join you in the journey.*

**STEPS**

**SUGGESTED TIME**
2-8 hours

**ROLES**
2-4 collaborators

**MATERIALS NEEDED**
template, pages 38-39
pens
paper
sticky notes

**1**

**FRAME THE OPPORTUNITY**
As a team, discuss the project you're embarking on. If it's exploratory, outline your **opportunity** and objectives. If you're using the plan to test prototypes, define initial hypotheses and/or variables you'd like to test.

**2**

**DEFINE TEAM ROLES**
Get on the same page about responsibilities and how they fit each individuals' strengths and goals. Explicitly defining these details upfront minimizes challenges later on.

Want to learn more about team roles and norms? See Tool 7: Team Roles + Descriptions (page 52).

**3**

**SET YOUR PLAN**
Use the project planner template to plot **activities** and required **resources** over time. Start by defining the duration, then parse it into **key stages** and milestones. Next, map activities and resources in a way that recognizes their dependence on one another.

**4**

**ENVISION SUCCESS AND LEARNING**
Before you rush off to start your work, pause to reflect with your team. What does **success** look like for this effort? What outcomes would you be proud of and would your organization find valuable? How do you plan to factor in **iteration** and learning along the way?

**References: Prioritization Tools** Selected methods from The DIY Toolkit (Nesta), Insights Into Action (CGAP), and TPP (Bill and Melinda Gates Foundation)

## Tool 5
### Project Planner (1/1)

**PROJECT CONCEPT:**

**OWNERS:**

**OPPORTUNITY** What opportunity area(s) does your project explore?

**PROJECT STAGE PLANNER**

| 1. | 2. |
|---|---|
| Activities | |
| Resources (internal / external) | |

| 3. | 4. |
|---|---|
| | |

**ITERATION** How can your concept be improved upon and iterated over time?

**ROLES** Who's needed to make this a reality, and what are their responsiblities?

**SUCCESS** What would success look like for your project?