

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)

1

PROJECT CONCEPT:

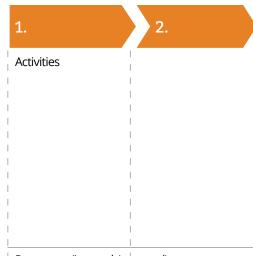
OWNERS:

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

ROLES Who's needed to make this a reality,

and what are their responsiblities?

PROJECT STAGE PLANNER



Resources (internal / external)

3. 4.

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

SUCCESS What would success look like for your project?

3