Project Planners

3 Planners:

- ❖ **All Projects**
- ❖ **Action Steps**
- ❖ **Subtopics**

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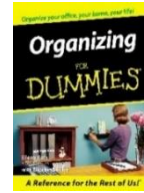
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Everything in its Place®

Eileen Roth
Your Tour Guide for Success

Mini bio

As the author of *Organizing For Dummies®,* Eileen Roth demonstrates how to be more productive, reduce your stress, and save time and money.

She named her company Everything in its Place® because she truly believes that you can find a place for everything.

Eileen is a national speaker, trainer and productivity expert in the areas of:
Office Organization, Time Management, and Home Organization.

She has appeared on the:
Today Show, Oprah, Fast Company, ASTD's Training & Development (now ATD), Successful Meetings, Office Pro, Self, Real Simple, Woman's Day, Men's Health, Chicago Tribune, LA Times, Washington Post, etc.

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Project Planners

If you have ever planned a project, you know that there are many elements. It's not like sitting down and writing one email. It has more than 1 piece and often some of the pieces can be accomplished by someone else -- a staff member, a team member, committee member, or even delegated to a virtual assistant.

The important thing about projects is that they are not accomplished in one sitting. They may spread over days, weeks, months, or even years.

There are often revisions, so deadlines are extremely important. Sometimes the deadline is non-existent. In those instances, it's best to create a deadline or the project will go on forever because project deadlines will take precedence.

3 different Project Planners:

      All Projects Planner
      Project Planner – Action Steps
      Project Planner – Subtopics   (and Action Steps)

Please read through the descriptions to understand how and when to use these.
REMINDER: Mark the download as MASTER and make copies to be able to reuse these over and over.

Formats

The 3 different types of planners have each been created in two formats:
      a. If you want to handwrite – copy the PDFs in this document.
      b. If you want to use tables - use the Word documents included in the
         download.

Why the different formats?

Some people might want to handwrite the information while others might want to type it on the computer and are familiar with tables.

If you handwrite and make a mistake or want to re-order your list by date, you will have to start a new sheet.

Tables in Word allow you to easily move the information around. So if you put something on one line, and the deadline changes, or the item needs to move to a different subtopic or even to a different project, it can easily be done.

All Projects Planner

The first Project Planner is called All Projects. Just as its name implies, use it to list all your projects. It is *not* a To Do List; it's just for projects. When you see what is coming up, you can plan your projects by priorities.

Start by listing every project you already have. After that, you may want to skip a few spaces and then list projects you are thinking about that are either low priority or have no deadline at all. They may even be "nice to do" projects.

Or you may want the "nice to do projects" on a separate sheet until they get a deadline or become a priority for you to do.

Project Names
Choose a name that tells you what the project is. Think of the name for now like Keywords. Use something descriptive that everyone working on the project would understand. You can always change it later.

Who
Who is going to work on this project? If several people will eventually be assigned parts of it, who is the main coordinator of each project?

Due Date
If there's a set date, put that date down. If there is not a set date, choose a reasonable date that you think this project could be finished.

> *Tip:* You may not decide on a date until:
> a. after you break the project down into action steps in one of the other two planners
>
> b. You consider how each project fits into your current schedule.

Project Planner – Action Steps

The Project Planner – Action Steps is often used in 3 different circumstances:

1. When you are first creating a project and are listing action steps.
When you're planning a project, you don't always see any subtopics until after you've listed the action steps for the project. So start with this planner and then the Project Planner – Subtopics can help you organize the project into related chunks or subtopics.

2. When you have only 2 or 3 subtopics with long lists.
This project planner gives you room to create longer lists on this form.

For instance, if you are planning a dinner, you have more room to list every item for the meal and a grocery shopping list.

3. When you want to delve deeper into a particular subtopic.
There may be so many details, you need to list them all in a longer list than the Project Planner – Subtopics form has.

Who
If different people are doing different action steps, be sure to list each person's name.

Due Date
When other people are working on this project, give each one their own due date – *earlier than the real due date*. You probably want to review other people's work, so don't use the final due date, or you won't have time to make any changes.

If someone's work depends on someone else's part being done first, be sure to list a reasonable due date for the first part to be completed so the next person can complete their part by their due date. This often means re-organizing the list by due date within subtopics.

Project Planner – Subtopics

This planner allows you to take one project at a time and break it down into subtopics or chunks putting related pieces together.

For instance, to complete this product, I had 4 subtopics:
1. Decide on a product and create it.
2. Create a cover picture and product picture
3. Create a sign-up page and download page
4. Write an email sequence for after delivery.

Under each subtopic, you can list action steps (or tasks) that need to be done. This is particularly useful to assign action steps to someone else: a staff member, team member, committee member, or virtual assistant.

For example, subtopic #4 is Create the email sequence. Listed below are several individual tasks for this subtopic.
Email 1 - Welcome and All Projects Planner
Email 2 - Project Planner –Action Steps
Email 3 – Project Planner - Subtopics

Who
Put the name of the person responsible for each Subtopic as well as individual tasks if they are different people.

Due Date
When other people are working on this project, give each one their own due date – *earlier than the real due date*. You probably want to review other people's work, so don't use the final due date, or you won't have time to make any changes.

If someone's work depends on someone else's part being done first, be sure to list a reasonable due date for the first part to be completed so the next person can complete their part by their due date.   This often means re-organizing the list by due date within subtopics.

No Subtopics
If you can't think of any subtopics, use the Project Planner – Action Steps.

All Projects Planner

Updated: _____

✓	Project Names	Who	Due Date

Project Planner – Action Steps

Project Name: _____   Updated: _____

✓	Action Steps	Who	Due Date

Project Planner – Subtopics

Project Name: _____   Updated: _____

✓	Subtopics and Action Steps	Who	Due Date
	Subtopic 1:		
	Subtopic 2:		
	Subtopic 3:		
	Subtopic 4:		