

Project Planning Worksheet

One worksheet per initiative. A project plan is the collection of all initiatives serving a single law firm goal, so name that goal first. The person accountable for delivery is the Directly Responsible Individual, shown as DRI in the tables below.

IDENTIFICATION			
Law Firm Goal This Supports <i>From your Business Portfolio</i>			
Initiative <i>The specific action this worksheet covers</i>			
Project Name			
Directly Responsible Individual <i>One name, known to the team</i>		DRI Reports To <i>Who receives the update</i>	
Project Sponsor		Where This Plan Lives <i>Software, or this page</i>	
Start Date		Target Completion Date <i>Set with the team, work backwards</i>	

PURPOSE AND OBJECTIVES	
Purpose <i>Why this initiative exists and how it moves the goal above</i>	What Success Looks Like <i>The finished state, in terms the team can recognize</i>

GOALS AND KEY PERFORMANCE INDICATORS					
<i>Pair each goal with the indicator that proves it. An indicator with no baseline, target and review frequency cannot be managed.</i>					
GOAL	INDICATOR	BASELINE	TARGET	FREQUENCY	SOURCE

Scope, Constraints and People

SCOPE OF WORK	
IN SCOPE	OUT OF SCOPE
What this initiative will cover	What is excluded, so the goal post cannot move

CONSTRAINTS AND LIMITATIONS		
Unidentified constraints cause avoidable delay. A constraint is a fixed boundary you plan around. A risk, recorded on page four, may or may not happen.		
CONSTRAINT OR LIMITATION	TYPE	PLANNING RESPONSE
	Budget, time, people, technical, regulatory	

TEAM AND STAKEHOLDERS	
INTERNAL	EXTERNAL
Team members and their part of the work	Clients, partners, vendors and referral sources

Timeline

Work backwards from the target completion date. Set the dates with the team rather than for them, build in buffer, and revise the plan in writing when reality moves.

Buffer Built Into This Timeline <i>Days or weeks held in reserve</i>		Timeline Last Reviewed On	
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MILESTONES					
MILESTONE	DRI	DEPENDS ON	PLANNED DATE	REVISED DATE	STATUS

TASKS AND DELIVERABLES					
TASK OR DELIVERABLE	DRI	DEPENDS ON	PLANNED DATE	REVISED DATE	STATUS

Resources and Risk

RESOURCE ALLOCATION	
Budget Estimate	
Approval Required From <i>Leave blank if the DRI already holds the authority</i>	
DRI Decision and Spending Authority <i>What this person may decide without asking</i>	
Tools and Software Needed <i>Licenses, seats, integrations, and who procures them</i>	
Human Resources Needed <i>People, hours, and any outside help such as consultants or vendors</i>	

RISK MANAGEMENT				
<i>Rate impact and likelihood as high, medium or low. Every risk carries an owner, because a mitigation plan with no name attached is a wish.</i>				
POTENTIAL RISK	IMPACT	LIKELIHOOD	MITIGATION PLAN	RISK OWNER

Communication and Measurement

COMMUNICATION PLAN	
Status Updates <i>Weekly, every two weeks, monthly</i>	
Reporting Method <i>Email, Slack, meeting, dashboard</i>	
Meeting Cadence Where This Is Reported <i>The standing meeting that holds the DRI accountable</i>	
Decision-Making Process <i>Who decides, who is consulted, who is informed</i>	
External Stakeholder Communication <i>What clients, partners and vendors are told, by whom, and when</i>	

PROJECT METRICS			
<i>These five are reviewed at the cadence named above, alongside the indicators on page one.</i>			
METRIC	HOW IT IS MEASURED	REVIEW CADENCE	CURRENT READING
Schedule Adherence			
Budget Variance			
Project Scope Change			
Resource Utilization			
Quality of Deliverables			

PROJECT HOLD PROTOCOL			
<i>If a more urgent initiative displaces this one, the hold is authorized in writing and the team is told, so nobody waits on a delivery date that has quietly moved.</i>			
Hold Authorized By		Date Authorized	
Team Notified On		Work Resumes On	

Post-Launch Review

The first check is never launch day. Schedule every checkpoint at the outset and record what you find, because the lessons are the return on the planning.

CHECKPOINTS AFTER LAUNCH			
CHECKPOINT	DATE	DRI	FINDINGS AND CORRECTIVE ACTION
One Day			
One Week			
One Month			
One Quarter			
One Year			

FEEDBACK AND FINAL REVIEW	
Question and Answer Sessions <i>Dates in the first weeks after launch, including after hours options</i>	
Final Review Meeting <i>Date, and who attends</i>	

Lessons Learned <i>What worked, what did not, and what changes in the next project plan</i>

Initiative Closed On		Closed By	
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