



## Chapter One: Introduction to the Project Planner

I've written some lengthy and thorough introductions to project planning. (One appears in the book *The SAN Primer for SMB*, in case you're interested.) My thoughts on this process have been posted on blogs, newsgroups, and "expert" forums.

This Project Planner is different. Here I cover my core approach to project planning and then jump into a down-and-dirty, get-it-done process for creating and implementing projects that work.

My primary audience is the technical consultant. But this process, with very little fine-tuning, should work for just about any SMB project.

### What is a Project?

Before we get too far, let's define our terms. A **project** is any undertaking that requires more than two steps that can't be completed at the same time.

So, for example, changing your password is not a project. But installing a new server is a project (discovery of old network, building of new server, install virus scanner, install backup software, etc.).

There are also small projects and large projects. You will occasionally have “macro” projects, which are really big containers with smaller projects inside. Please note that you don’t need a project binder for every project. But as the complexity of a project increases, the need to keep track of it also increases.

Why is this a **Super Good** project planner? Very simple:

First, it’s very simple. This process is easy to learn and easy to teach to your assistants, fellow technicians, and sub-contractors.

Second, with this project planner, no work goes un-done. That means you have checklists. When everything’s checked off, everything’s done. It also means there’s a built-in process for spinoff work that comes up as a result of the project. When some piece can’t be completed as planned, it goes into the “additional work” section.

All of which leads to . . .

Third, each project has a **scope of work**. Everything inside the scope of work is part of this project. Add-ons and spin-offs are outside the scope, and therefore outside the project. They get written down, additional service tickets are created, and nothing gets dropped or forgotten.

Fourth, these projects are successful and profitable. We know that because, by design, there’s a scope of work and an allocation of resources (primarily labor). When you complete the scope of work, you complete the project.

You also avoid “scope creep” – adding chores to this project. Very often scope creep is simply additional work for no additional money. With this process, all that additional work becomes service tickets that are billable on another day!

## **The Project Binder**

One of the key elements to success with projects, as we provide them here, is the Project Binder. Actually, let’s call that the Super-Good Project Binder!

The binder is important to your success because it’s the ultimate random-access guide to your project. You can flip it open and find out where you are in the project, the next action step, how many stages there are, and all the documentation you’ll need at the end.

We’ll get back to the binder discussion in much more detail. For now, here’s the view from 30,000 feet.

The Project Binder consists of a series of forms. They are designed to elicit a lot of the details you'll need as you work through the project. The great thing about a standard set of forms is that you don't forget to ask any of the key questions, and you don't skip any steps.

The Project Binder started out as a "generic project" in our consulting company. We realized, as we grew, that we needed a way to make projects work as we hired more and more technicians.

One- and two-person companies don't have much problem with projects as long as one or both parties keep themselves involved and informed. But, when a consulting company begins to grow, they face an important challenge that must be addressed: How do you keep a project moving in the right direction, and profitable, when you have to coordinate it between several people?

The answer is: You need a tool that provides a way for everyone to come up to speed – quickly – on your project. Once you have that ability, you can have several people work on a project and keep it all moving in the right direction.



### **Key to Your Success**

This is the 21<sup>st</sup> Century: We assume that you are using a modern PSA or Professional Services Administration tool. It might be ConnectWise, Shockey Monkey, or something in between.

No matter how you do it, we'll assume that you use Service Requests or Service Tickets to keep track of jobs. You could use an Excel spreadsheet, if it works for you. But you need to use something.

No matter what you use, we assume you use it religiously. That means that everything gets entered. Everything gets written down. You want to make more money in your business? That's easy: Keep better track of all the work you do.

Anyway, throughout this document you'll see references to Service Requests and Service Tickets. These are interchangeable. But they're not optional. 😊