

# R.E.A.L Goal<sup>SM</sup>: Project Planning

*(Realistic, Easy, Attainable, Life Goals)*

**Example:** Use project planning strategies to finish projects on time.

## THE BENEFITS:

Planning is predetermining a course of events for any project or activity. It is a critical first step to determine where you want to go, how you intend to get there, and how long it will take.

## HOW TO:

**PROJECT PLANNING:** use this planning method for each multi-task project to break down the project into smaller, more manageable tasks:

- Gather information about the project: Identify available resources and information about the project. Ask the following questions for each assigned project to clarify expectations, confirm deadlines, and identify the steps to follow.

### **Questions to ask:**

- What are the expected results?
  - What are the timelines? Are they realistic?
  - What resources are available?
  - Is there already a particular procedure for completing the project or activity?
  - Who do I need to consult with or partner with on this project?
  - What kind of follow-up is required and how often?
  - What obstacles can be anticipated?
  - What happens if this project is not completed?
- Create a task list for the project: Use the information you gathered to make a list of the individual tasks needed to complete the project. This will help to break the project into smaller, incremental steps and makes tracking easier. This process also adds organization, allows for logical sequencing of events, stops your project from becoming overwhelming, and gives you a feeling of accomplishment as you complete each task.
  - Schedule the completion of each task on a calendar; assigning each task to a specific day or specific time helps you allocate time to complete each task and keeps you on schedule. It also discourages procrastination. Specifically, identify the task you need others to complete and assign time to complete them.

### **Tips for scheduling tasks:**

- Limit the number of daily tasks if this will impact daily duties.
- Consider timelines for other projects, the schedules/work demands of others, and be realistic about what is achievable.
- Leave 'white space' (i.e. blocks of time without task scheduled) each day for the unexpected.



- Keep in mind the number of people you have available to help you.
- Write in pencil so adjustments are easier if things should change.

## **TIPS:**

### **CREATING A DAILY TO-DO LIST**

- Identify daily tasks: Use your resources to identify the task for each day. Your daily To-Do list is made up of routine tasks and/or tasks from individual projects and activities. Make sure your list consists of one-step tasks (i.e. vacuum workspace). Use the project planning method (above) to break down daily projects into multiple tasks.
- Prioritize your to-do list: Prioritizing helps you identify the order in which the task should be completed. If you are unsure of the priority consult a co-worker or supervisor. Use the system below for assigning priority to tasks:  
An "A" priority is an immediate or critical must-do, such as a meeting or firm deadline.  
A "B" priority is a middle-range or basic task. It is a typical day-to-day activity that affects your business with our having a specific deadline.  
A "C" priority is a routine task that is a nice-to-do, but not essential to your business.

#### ***When prioritizing ask yourself:***

- Will this task interfere with customer service?
- Can this task be done during regular business hours?
- Do I need my supervisor to clarify the priorities?
- Do I need assistance from a colleague/staff member?
- Assign time frames: Estimate the amount of time needed to complete each task and identify a specific time block for execution.
- Delegate tasks as appropriate: Assign tasks to a staff member based on an area of expertise after checking schedules. Make sure employees or co-workers understand the task should not impact regular duties.

#### ***Use this checklist to make sure you are delegating properly:***

- Establish the individual's responsibility to complete the task.
- Discuss timelines for completion
- Explain the priority of the project
- Review information to complete the task
- Express confidence in the individual's ability
- Follow-up: This includes checking the employee's progress with the task. When the employee is done, cross off the to-do list.
- Revise the daily to-do list: When unexpected changes or obstacles arise, you will need to revise the To-Do list. To edit the To-Do list, follow the steps for creating a Daily To-Do list starting with prioritizing the list.

To choose another goal, go to: [wellfirstbenefits.com/realgoals](https://www.wellfirstbenefits.com/realgoals)

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