



# Before You Create a Work Plan, Create a Project Profile

episode 084

[www.mamieks.com/podcast-084](http://www.mamieks.com/podcast-084)

Most people think of project planning as the execution plan: Who needs to do what by when. But before we get to milestones, RACIs, or fancy gantt charts, it's important to align the team up front on the strategy and scope of the project. Without this critical step, it's easy for projects to go off course, friction to arise between team members, and time, energy and money to be wasted.

This guide contains a Project Profile template, an example of a completed Project Profile, additional prompts to help you reflect on and answer each section, and an overview of how to use the Project Profile with your team.

"There are great tools for planning the work to be done, but there's a serious gap in tools and activities for planning the strategy of a project. Without this critical step, its hard to get buy-in, align on expectations, or gather the best thinking to make strong decisions."



## How to Use the Project Profile With Your Team

### *Option 1: Collaborative Document*

1. Designate one person to begin the draft. This can be you or a colleague with sufficient knowledge to generate a solid starting point.
2. Share the draft with the team members by encouraging them to contribute their thinking, ask questions, challenge ideas, etc. (See example email below.)
3. Meet for 1.5-2 hours to work through the content and resolve and open issues, wrestle down disagreements, and clarify questions. The final working draft should be 'owned' by everyone.
4. Share the final working draft with advisors, sponsors and others who can provide meaningful input.
5. Make any additional refinements based on the feedback. Include the team in any decisions to make substantive changes.

### *Example email language*

Hi team,

I'm sharing this first draft Project Profile to help us get aligned on this initiative. What's written is just my early brainstorming. It is not meant to be set in stone and I encourage you to enhance it, question it, challenge it, and add your own ideas. I have no pride of authorship.

Please use track changes to add your ideas and edit others' contributions. Use comments to add questions or comments. This will make it easier for us to work through the content when we gather next week to discuss.

Thanks in advance for your great thinking!



## *Option 2: Project Kick-off Session*

1. Gather for 3-4 hours as a team to co-create the Project Profile.
2. Provide any background materials that will give participants necessary context so they can contribute their best thinking during the meeting.
3. Work through each section of the Project Profile. Be sure to jump around as needed to enrich various sections as decisions are made. This is not a linear process.
4. Use a variety of activities to engage participants and keep the energy high:
  - a. Participants brainstorm answers on sticky notes and and cloud cluster responses.
  - b. Discuss the prompts for one section with a partner. Take notes to report back to the group.
  - c. Move 'round robin' by assigning one section to each participant to work on for 5 minutes. Then rotate.
  - d. Take 5 minutes for everyone to ONLY be Devil's Advocate and share concerns of all types throughout the document.
5. Together work through the document one final time. It should be 'owned' by everyone.
6. Share the final working draft with advisors, sponsors and others who can provide meaningful input.
7. Make any additional refinements based on the feedback. Include the team in any decisions to make substantive changes.

**"While it may seem like a lot of work, it shouldn't be a burden. Your team members will appreciate the opportunity to shape the project. Everyone will benefit by having shared understanding and expectations."**

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mamieks.com/podcast-084



@mamieKS



mamie.kanfer.stewart



@mamieKS

## Additional Resources

***Project Profile Template*** -- <http://bit.ly/MMProjectProfile>

Use this template to clarify, document and align the team's thinking. Modify, remove or add sections to meet your team's needs.

***Project Profile Example*** -- <http://bit.ly/MMProjectProfileExample>

View the actual Project Profile for Mamie's Managerial Greatness project.

***Project Profile Additional Prompts*** -- <http://bit.ly/MMProjectProfilePrompts>

Use these questions to help you reflect, brainstorm, and think deeply about the work to be done.

"The project profile is a quick and easy way to get input from a lot of people such as your boss and colleagues in other departments. Share it with anyone whose thinking can enhance your own."