

Project Definition Worksheet

Description

The Project Definition Worksheet provides focus for the entire project and helps you translate the vision for the project into clearly defined outcomes.

How can you use it?

- To set and manage management expectations.
- To establish a specific direction for the project team.
- As a project deliverable requiring sign-off from the project sponsor.
- As a baseline of expected performance for the project.

Tip

The Organizational Readiness Action Plan section of the worksheet is intended to highlight the critical pre-course and post-course factors that are required to support the successful implementation of the project. Even if the training is great, the project can still fail if these factors are not properly addressed.

Note

The Project Management for Trainers workshop gives you a comprehensive Project Manager's Toolkit of structured worksheets, checklists, tools, and techniques to help you manage all aspects of a training project: from defining the project to producing an after-action report of lessons learned.

Project Definition Worksheet

Project Name: _____

Project Objective

1. What knowledge and/or skills will this course impart?

2. At the end of this course, participants will...

3. What business/organizational objective is this project supporting?

4. What business/organizational results are expected from this project?

5. Project Objective Statement:

Project Risks

1. What organizational barriers must be considered when implementing this course?

2. Was a training needs analysis completed for this project? Yes No

3. Does the training needs analysis show a clear need for this course? Yes No

4. What are the consequences of **not** designing this course?

Organizational Readiness Action Plan

1. What on-the-job standard(s) must employees meet?

2. How will the performance of learners be measured?

3. How will learners know that they are performing to standard?

4. What on-the-job opportunities will learners have to improve their performance?

5. What will motivate learners to improve their performance?

6. What will ensure that learners have the base skills needed for this project to succeed?

Example: Project Definition Worksheet

Project Name: Feedback Skills Project

Project Objective
<p>1. What knowledge and/or skills will this course impart? <i>Observing employee performance and providing constructive feedback.</i></p>
<p>2. At the end of this course, participants will... <i>Give feedback to employees.</i></p>
<p>3. What business/organizational objective is this project supporting? <i>Supports the rollout of the new leadership initiative.</i></p>
<p>4. What business/organizational results are expected from this project? <i>Improved job performance.</i></p>
<p>5. Project Objective Statement: <i>Design a course that provides supervisors with the knowledge and skill to give feedback to employees by <date> and within budget.</i></p>
Project Risks
<p>1. What organizational barriers must be considered when implementing this course? <i>Resistance to the perceived time it takes to give proper constructive feedback. There is an existing belief that "things are working just fine the way they have always been."</i></p>
<p>2. Was a training needs analysis completed for this project? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>3. Does the training needs analysis show a clear need for this course? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>4. What are the consequences of not designing this course? <i>Impact on the deadline for rolling out the new leadership initiative.</i></p>

Organizational Readiness Action Plan

1. What on-the-job standard(s) must employees meet?

Management must clearly define expectations to supervisors before they begin the course.

2. How will the performance of learners be measured?

Managers must observe supervisors to compare performance against expectations.

- Pre-course Interview: Managers will interview supervisors to assess their performance.
- Workshop: Supervisors attend workshop to learn and practice giving feedback.
- Post-course Phase: Managers will periodically assess supervisors' performance.

3. How will learners know that they are performing to standard?

Managers will give feedback to supervisors so they can improve performance.

4. What on-the-job opportunities will learners have to improve their performance?

Implementing the post-course phase over a 3-month period will allow supervisors time to apply the new skills, get feedback on their performance, and make necessary adjustments and improvements.

5. What will motivate learners to improve their performance?

Demonstrate the benefit of applying the new skills to supervisors and link their performance of the new skill to their annual performance appraisal. This will require an update to the current performance appraisal form/documentation.

6. What will ensure that learners have the base skills needed for this project to succeed?

Management must promote/hire supervisors who can demonstrate sound communication skills.