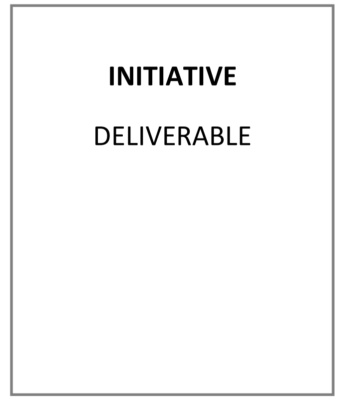
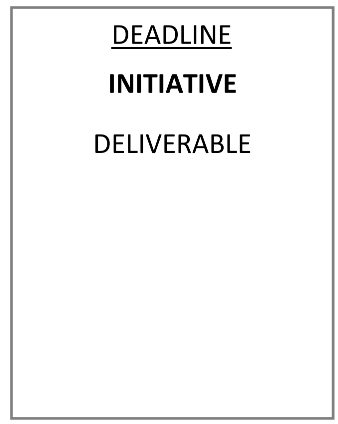
<u>PART 1 – Choose a Project</u>

1. As a team, rapidly **identify an initiative** you are working on already or a potential project. Don't get bogged down looking for the "perfect" one: choose something real with multiple steps and people/organizations involved. <u>Write the initiative at the top of your flip chart</u>.
2. As a team, **identify the deliverable** that you will have at the end of your initiative. For example: recommendations developed for statutory revisions to streamline a core process; new IT solution implemented; new onboarding process for employees designed, approved, and in place; etc. <u>Write the deliverable beneath the initiative on your flip chart</u>.



<u>PART 2 – Decide the Due Date</u>

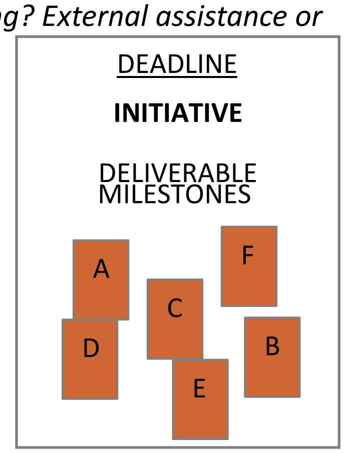
3. As a team, **decide the initiative's due date**. When choosing this deadline, consider such factors as:
   A. *Given other department priorities, how important is this project? E.g., department leadership has committed publically to deliver results by end of calendar year*
   B. *Do any external requirements influence your deadline? E.g., the project needs to be completed in time to define NDI request for next budget cycle (to be submitted on October 1)*
   C. *Does this project's completion date affect the timing of other projects? E.g., the project to redesign (i.e. "lean out") a core business process must be completed before the department can define requirements for RFP to automate the process.*
4. <u>Write the **deadline on the flip chart** above your project</u>



<u>PART 3 – Identify Major Milestones</u>

5. As a team, **identify the major milestones** to complete the initiative. Consider the following:
   A. *What work needs to be done? Research? Design? Training?*
   B. *Who needs to do the work? Just you? Just your team? Other units? Other divisions? Other departments? Other organizations outside of government?*
   C. *Whose approval (if anyone's) do you need? For which steps? What will they need to make their decision (e.g., report; analysis; etc.)?*
   D. *What resources will you need to complete the project? People? Funding? External assistance or expertise via an RFP?*
6. **<u>Write down each milestone on a post-it note</u>**. Place them on the flip chart in the order in which they are suggested by the team. You can have as many milestones as you need. Capture them all. **Also write down on the post-it note underneath the milestone who is "accountable" for the activity and who is "responsible" for doing the actual work.**

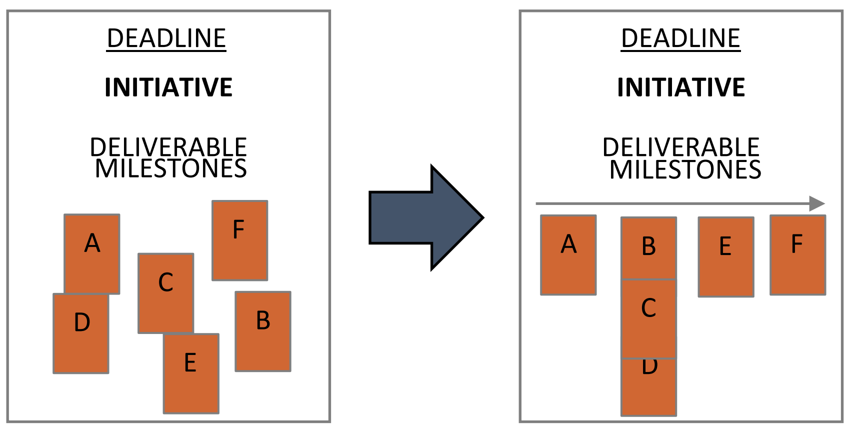
7. Write the word "milestones" above your post-it notes.



PART 4 – Order the Milestones

8. Place your **milestones in the order** in which they need to be completed. Earlier milestones should be to the left-hand side and later milestones toward the right. Some tips to consider:

   A. *Start with your last milestone and work backwards*
   B. *Remember your last milestone has to be completed by the initiative deadline (i.e. far right on the chart)*
   C. *If milestones are part of the same work stream, group them together in order from the earliest to the last to be completed*
   D. *Your activities and milestones may overlap in timing. In other words, some things may need to be done in "parallel paths" or at the same time*
   E. *If a milestone needs to be completed before another, make sure it is positioned earlier in the sequence than the other*



PART 5 – Define the Task

9. Select at least one milestone (e.g., define content for new employee onboarding process). Now **define the specific "tasks"** that need to be completed for that milestone (e.g., collect existing onboarding material from all departments; assess effectiveness of current materials; research best practices from other states and organizations; etc.). Follow the same basic steps #3-7 on another page of your flip chart. These are the tasks for the milestone.