

VIS-IT™ PROJECT TASK PADS

Quick Start Reference Guide

Project Task Pads are designed for people who take on project leadership, management, or administration and are, thereby, accountable for identifying, planning, organizing, assigning, monitoring, or evaluating the several distinct “tasks” that must be accomplished in order for a project to be successful.

Begin by getting acquainted with a Project Task Pad sheet. It’s got:

- Space to briefly describe the Task that need to be done
- Space to capture an estimate of how long (Duration) the task will take
- Space to identify the Work Process to which the task belongs
- Space to assign a unique Task Number
- Space to identify predecessor (Depends on) tasks, if any
- Space to identify who (By) is accountable for completing the task
- Space for assigning Risk and Cost values or codes, and
- Spaces for critical path scheduling calculations: ES, LS, EF, LF

When ready to begin planning the project and its associated tasks, we suggest these steps:

1. Assess the probable scope and urgency of the project, and then bring together the people who can represent the work processes likely involved in the project.
2. Explain how the project’s success will support the purpose of the organization, and then be clear about the goals and sub-goals of the project, plus how the success of the project will be measured.
3. Assign someone the role of project meeting leader, who will facilitate project task planning with the planning team.
4. The meeting leader will ask the team members to explicitly identify the work functions or processes that are likely to be involved with, or contribute to, the project. Some project managers and planners call this step the “Work Activity Breakdown” or “Work Breakdown Structure.” In this technique, during the meeting, the leader will write each relevant function or process on a large VIS-IT Big Idea Pad sheet, and then arrange them from top to bottom in the likely sequence when their first contributions will be made. Once the rough sequence is determined, then label each function or process with a capital letter, A,B, C,... See Figure 1 below.
5. Brainstorm to identify the tasks that the team thinks are necessary to successfully accomplish the project. Use a focus question like: “What are the tasks that you believe must be performed well in order for the project to succeed?” Ask the team members to reflect on their experiences with the function they represent, plus also consider other important tasks that must be performed by other functions. Ask the members to think quietly about the focus question for several minutes, and to list the tasks that come to mind, putting the letter that represents a function in parentheses at the end of each listed task. Important: Also, ask the members to estimate the normal time it will take (the Duration) of each task. Use a structured round-robin approach to capture the task ideas relative to each of the displayed functions or processes. Begin with the “A” function, and, in order, ask each participant to contribute one task idea for that function. Ask the members to *not* repeat a task that has already been satisfactorily identified. After all tasks relative to the first function have been offered,

then go on, in order, to the other functions, until all the tasks have been initially identified.

Note: As the task ideas are offered, the meeting leader writes each task idea on a VIS-IT Project Task Pad sheet, noting on the sheet both (a) the estimated duration, and (b) Process or function code letter. The meeting leader does not yet assign a task number. The task ideas are posted, as they are offered, to the right of the process to which they have been assigned. If team members disagree about the function to which a task should belong, then the person offering that task idea is asked to explain the rationale, and then the group is asked to decide, by consensus, the function to which the task belongs for now. See Figure 2 below.

6. After all the tasks have been identified and aligned with the Process to which they belong, then a representative of that function is asked to come to the display board and arrange that function's tasks into predecessor and successor relationships *within that function only*, and then to assign a task number, beginning with "1," to each task in their logical, sequential order. At the end of this step, all tasks will be sequentially numbered within each function. Tasks could then be referred to as "Task B3" or "Task C2" or "Tasks F3", for example, with each task having a unique designation code. See Figure 2 below.
7. Remove the Post-it™ sheets that represent the functions, and rearrange them horizontally elsewhere in the same sequence so that the group can still refer to them as needed.
8. The meeting leader, with support of the team members, begins to arrange the Project Task Pad sheets, from left to right, in sequence of dependence (predecessors and successors). Begin by selecting the function that must make the very first contribution, and then select the first task from that function. Place that task at the very left side of the posting space. Then begin arranging the tasks on the display area such that the desired completion sequence moves from left to right. See Figure 3 below.
9. After all the tasks have been arranged, then draw arrows to explicitly describe the predecessor-successor (Depends on) relationships between the tasks. See Figure 4 below.
10. (Optional) Add any additional evaluations, like Risk and Costs, to each task.
11. (Optional) Enter the task information, including predecessor task relationships into software like Microsoft Project™ to determine the projects critical path, or perform the critical path calculations manually.

To illustrate the use of Project Task Pads, we will present figures to illustrate the tasks associated with a sample project, which is to launch a new product kit of VIS-IT™ products that support the Norman Storyboarding System's Creative Meeting Application.

VIS-IT™ Project Task Pads come in two sizes: a standard pad of 50 3" x 5" sheets, and a Jumbo Project Task Pad, which is 8" x 6". Both are produced by Vision Works, LLC from genuine Post-it™ paper and adhesive.

Order Project Task Pads, Big Ideas Pads, VIS-IT Hexagons and FlowShapes™ on the web from www.vis-it.com, or telephone **1-888-439-7237**.

Figure 1: Work Activity Breakdown, including work processes involved in the project.

A Conceptualize
B Prototype
C Business Planning
D Design and Devlop
E Marketing
F Production
G Sell and Distribute
H Service and Support
I Finance and Accounting

Figure 2: Tasks identified and associated with each work process or function.

A Conceptualize	A 1 Create Concepts			
B Prototype	B 1 Build and test prototypes			
C Business Planning	C 1 Assess market size and access	C 2 Estimate price, costs, margins		
D Design and Devlop	D 1 Design and test kit components	D 2 Produce System Guide		
E Marketing	E 1 Articulate features and benefits	E 2 Select target customers	E 3 Set price	
F Production	F 3 Order/Recieve Kit materials	F 2 Assemble and package kits		
G Sell and Distribute	G 1 Sign on sales Partners	G 2 Contact poten- tial customers	G 3 Make sales	G 4 Promote on the web site
H Service and Support	H 1, Promote kit refills			
I Finance and Accounting	I 1 Get info into acctg systems			

Figure 3: Rough arrangement of tasks into predecessor and successor relationships.

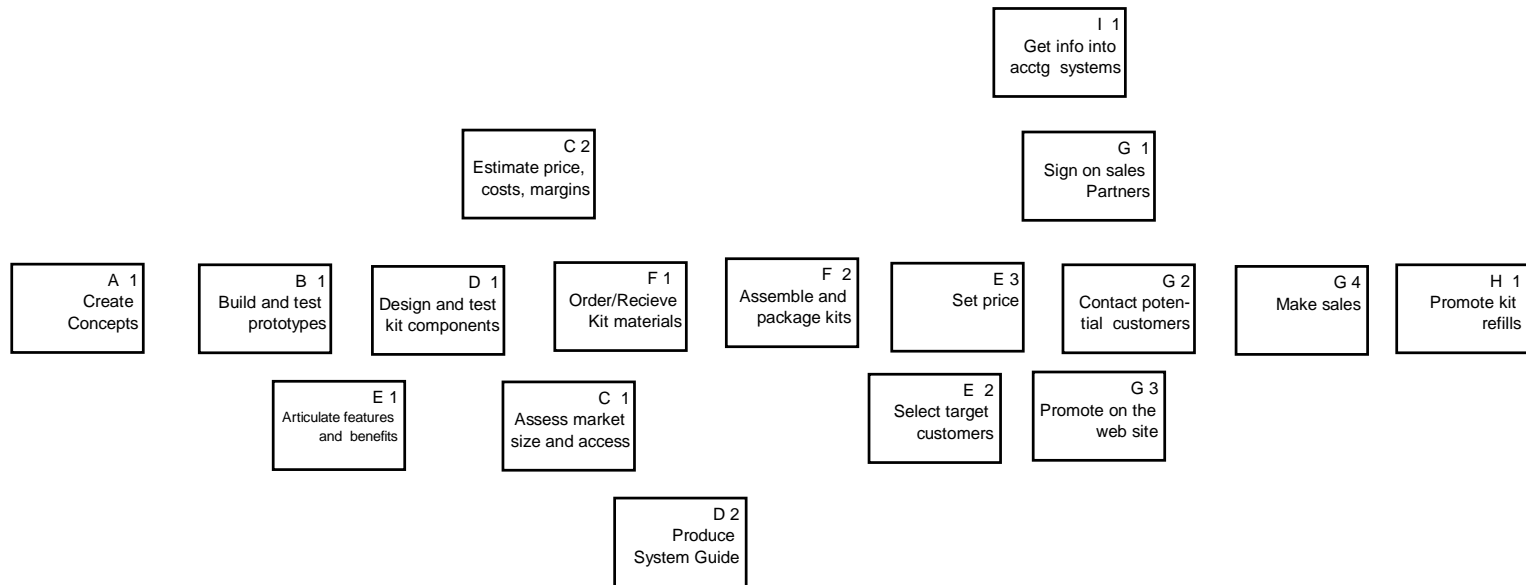


Figure 4: The “Depends on” sequence is explicitly described by relationship arrows.

