

// Project Planning Canvas: **PROBLEM / PEOPLE / PROCESS**

Project Name:

Date:

Version:

BACKGROUND.



Why does this project exist/start? Why is it important? Which company goal, OKR or strategy does this support? What happens if we don't do it?

CONSTRAINTS.



What are the set current barriers? Which restrictions affect the project (resources, money, time, quality, procedures, standards, technology, knowledge)?

THE CHALLENGE.



Capture the initial problem statement you're solving for. Rewrite the challenge several times with wider and narrower frames. Ask 'why' to widen and 'how' to narrow the frame.

BENCHMARK.



How did we or others try to solve it in the past? What are our competitors doing about it? What works and what didn't? What current trends impact us?

OUTCOME.



How do we know your project is a success? (KPIs) Be concrete about what deliverables you need by the end. Make it a SMART-goal.

RISKS.



What potential threats/events/conditions can affect the project? What can be done to reduce or enhance the probability? (Risk-Matrix: Impact × Probability)

ONE-LINER PITCH.



For [user] who [need/problem], [our project] will [primary benefit] because [insight/evidence]. Unlike [current alternatives], we will [unique approach].

SCOPE.



Which areas should and should not be covered with this project? What is part of the project and what is outside of the boundaries? What should not change?

RESOURCES.



What resources are needed/lacking in the project? Where will they be found? What is the total cost estimate (manpower, equipment, facilities, materials)?

TIMEFRAME & MILESTONES.



What are starting and end dates? What is the total time estimated for all project actions? What are the 4-6 milestones? When do the milestones occur? How is the achievement of a milestone measured?

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TEAM ROSTER.



List each team member’s name, role, and the superpowers they bring to the team. Plan for a balance of expertise, inspiration and decision making by representing different personas on your core team (RACI-Matrix). Look for:

- ☐ The Hustlers
- ☐ The Hackers
- ☐ The Hipsters
- ☐ The Hecklers

SECRET TEAM NAME.

Give your team a motivating name.



TEAM RULES.



What are rules we need to function as team? How do we communicate and make decisions? How do we execute and evaluate what we do?

INDIVIDUAL NEEDS.



What does each one of us need to be successful? What are individual personal goals? Are there personal agendas that we want to open up?

TEAM VALUES.



What principles does our team live by? What do we stand for? What are our values that we want to be at the core of our project?

FUEL SOURCES.



What energizes the team? Where do we draw inspiration from?

PROJECT STAKEHOLDERS.

AUDIENCE.



Who will benefit from the outcome of the project?
What assumption exist for each user group (Persona)?

STAKEHOLDERS.



Who else is interested or affected by the project? What is their role in the project? How are they engaged and involved in project communication (RACI-Matrix)?

EXECUTIVE SPONSOR.



Who is accountable for the success of the project?
Who is the first executive person to talk to?

TEAM STRENGTHS.



What are hard and soft skills we have in the team that help us achieve our goal?
What strengths do we have, individually and as a team?

TEAM WEAKNESSES.



What could knock us off course? What internal and external conditions might impact our team?
What weaknesses do we have, individual and as a team?

EXAMINE.



Dig into the problem. Look at the history, context, objects, and people involved.

* OPEN >>

- ☐ Create a Design Brief
- ☐ Identify Constraints
- ☐ Stakeholder Inventory
- ☐ Competitive Analysis
- ☐ Interview Friends/Family
- ☐ Write a Discussion Guide
- ☐ Do Practice Interviews
- ☐ Create Research Screener
- ☐ Recruit Research Participants

* EXPLORE >>

- ☐ Secondary Research
- ☐ Inspiration Field Trip(s)
- ☐ Surveys
- ☐ Individual Interviews
- ☐ Personal Inventory
- ☐ Day In The Life (Shadows)
- ☐ User Journaling
- ☐ Competitive Analysis
- ☐ Expert Interviews
- ☐ Group Discussions
- ☐ Field Intercepts
- ☐ Secondary Research

* CLOSE >>

- ☐ Capture Observations
- ☐ Share What You Learned
- ☐ Set Up a Project Room

ESTIMATED TIME
TO EXAMINE:

UNDERSTAND.



Go deeper and find patterns. Reframe your challenge based on needs.

* OPEN >>

- ☐ Capture Stories Onto Post-its
- ☐ Prepare Quantitative Data to be Sorted

* EXPLORE >>

- ☐ Use Frameworks to Explore Relationships/Tensions in Data:
 - ☐ 2x2 Matrix
 - ☐ Hierarchies

- ☐ Affinity Mapping (Clustering)
- ☐ Empathy Mapping
- ☐ What / How / Why
- ☐ Journey Map
- ☐ Tension / Conflict Map
- ☐ Value Map
- ☐ 5 E's Experience Framework
- ☐ A-E-I-O-U
- ☐ Explore Metaphors & Analogue
- ☐ 5 Whys
- ☐ Persona Development

* CLOSE >>

- ☐ Opportunity Framing Matrix
- ☐ Develop Insight Statements
- ☐ Propose Hypotheses
- ☐ Identify Opportunity Spaces
- ☐ Create Design Principles

ESTIMATED TIME
TO UNDERSTAND:

IDEATE.



Have lots of ideas, good and bad. Don't stop at the obvious or the impossible.

* OPEN >>

- ☐ Create Insight Driven Creative Prompts (Questions)
- ☐ Create Lateral Inspiration Creative Prompts
- ☐ Create Disruptive Creative Prompts and Activities
- ☐ Create Creative-Constraints

* EXPLORE >>

- ☐ 'Think, Pair, Share' Sketching and Share Outs
- ☐ Conduct Solo Ideation
- ☐ Conduct Group Ideation:
 - ☐ Brainstorming
 - ☐ Role-Storming
 - ☐ Reverse-Storming
 - ☐ Six Thinking Hats
 - ☐ SCAMPER

* CLOSE >>

- ☐ Cluster Ideas
- ☐ Constellate Ideas
- ☐ Abstract Design Principles
- ☐ Create Criteria
- ☐ Sticker Voting
- ☐ Pitching
- ☐ Invite a Decision Maker to Select Top Ideas

ESTIMATED TIME
TO IDEATE:

EXPERIMENT.



Try some things out. Make some things. Learn quickly. Get feedback. Improve.

* OPEN >>

- ☐ Identify Assumptions to Test
- ☐ Choose Prototype and Fidelity
- ☐ Create User Feedback Discussion Guide

* EXPLORE >>

- ☐ Role Prototypes:
 - ☐ Storyboard
 - ☐ Persona
 - ☐ Journey Map
 - ☐ Role Play
 - ☐ Video

- ☐ Look + Feel Prototypes:
 - ☐ Mood Board
 - ☐ Wireframes
 - ☐ Interactive Demo
 - ☐ Physical Model

- ☐ Implementation Prototype:
 - ☐ Business Model Canvas
 - ☐ Value Proposition
 - ☐ Cost/Revenue Study
 - ☐ Partnerships
 - ☐ Distribution Channels
 - ☐ Production Methods

* CLOSE >>

- ☐ User Feedback Sessions

ESTIMATED TIME
TO EXPERIMENT:

DISTILL.



Tell the story of your work to others in a way that gets them excited.

* OPEN >>

- ☐ Reflect – Debrief Internally on Lessons Learned Throughout
- ☐ Extract Top Outcomes of Each Phase
- ☐ Identify Your Solution Strengths and Open Questions
- ☐ Synthesize Metrics and KPIs
- ☐ Create an Executive Summary

* EXPLORE >>

- ☐ Craft a Story Arc and Visual Aides
- ☐ Create an Elevator Pitch
- ☐ Create a Pitch Deck
- ☐ Create a Video
- ☐ Write a Manifesto
- ☐ Create an Action Plan
- ☐ Design a Sell-sheet/Magazine
- ☐ Rehearse With a Live Audience
- ☐ Refine Your Story
- ☐ Prepare a FAQs

* CLOSE >>

- ☐ Share and Re-share your Story
- ☐ Incorporate Feedback and Refine
- ☐ Get Resourcing/Action Plans Approved

ESTIMATED TIME
TO DISTILL: