



Project Planning



What is it?

The AAC Project Planning Tool structures your thinking about a project from start to finish. It allows you to set and make long and short-term deadlines, divide responsibilities among team members, and break down big goals into all its composite parts.

Why use a project plan?

Using a project plan helps to break a large project into small tasks and keep up with due dates. You may have a lot of steps you need to manage. The project plan puts everything in one place. By writing down all the steps to a project and setting deadlines for yourself/your group, you can build and manage accountability, and document progress.

Using a Project Plan

1. Review project guideline & rubric.
2. Create action items that start with the end in mind.
3. Split tasks among team members & set deadlines.
4. Work through the activities & mark when completed.

Setting up a project plan:

1. Open Excel.
2. Write the column headers on the first row.

Columns include:

- Stream: The section or different areas of the project. This is useful for sorting-e.g. planning, creating, editing.
 - Owner: Who will complete the task.
 - Action: What needs to be completed.
 - Deadline: The date the task or project needs to be completed.
 - Status: Fill this in when the task is started or completed.
 - Notes: Add any reminders you may need.
3. One you have added your headers you can fill in your project plan.

Example:

	A	B	C	D	E	F
1	Stream	Owner	Action	Deadline	Status	Notes
2	Company Selection	Amy	Post the name of the company	8/23/2020	Complete	
3	Company Selection	Beth	Ticker Symbol	8/23/2020	Complete	
4	Company Selection	Roger	Industry	8/23/2020	Complete	
5	Company Selection	Roger	brief explanation	8/23/2020	Complete	
6	10-K Phase I	Amy	Cover Page	9/13/2020	Complete	Completed September 1
7	10-K Phase I	Beth	Table of Contents	9/13/2020	Complete	
8	10-K Phase I	Amy	Balance Sheet Analysis	9/13/2020	Complete	
9	10-K Phase I	All	Other Exhibits	9/13/2020	Complete	
10	10-K Phase I	All	References	9/13/2020	Complete	
11	10-K Phase II	Roger	Income Statement Analysis	9/27/2020	Complete	
12	10-K Phase III	Amy	Cover Page	10/11/2020	In Progress	
13	10-K Phase III	Beth	Table of Contents	10/11/2020	In Progress	
14	10-K Phase III	Beth	Executive Summary	10/11/2020	In Progress	
15	10-K Phase III	Roger	Audit Report Analysis	10/11/2020	In Progress	
16	10-K Phase III	Beth	Cash Flow Statement Analysis	10/11/2020	In Progress	
17	10-K Phase III	Roger	Ratio Analysis	10/11/2020	In Progress	
18	10-K Phase III	Amy	Financial Statement Exhibits	10/11/2020	In Progress	