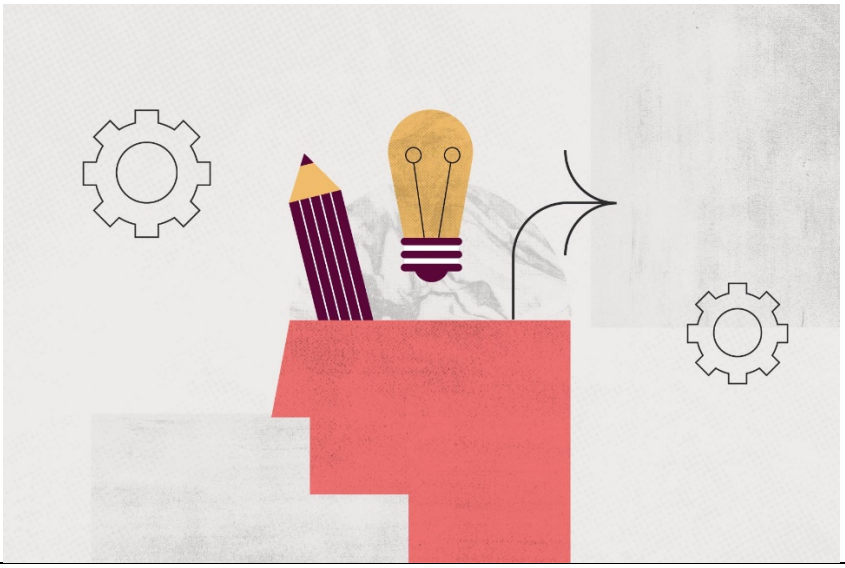
What is project design? 7 steps with expert tips

Team Asana



Summary

Project design is an early phase of the project lifecycle where ideas, processes, resources, and deliverables are planned out in seven steps. With detailed resources and visual elements, find out how project design can streamline your team's efficiency.

When it comes to managing projects, it can be hard to get everyone on the same page. With multiple moving parts, different deliverables, and cross-departmental collaboration, sometimes an initial project meeting just isn't enough.

Project design is an opportunity to align on ideas, processes, and deliverables. It's an early phase in the project lifecycle and often comes before a project plan or charter. This is because it focuses on the project overview rather than the specific details. Visual aids such as flowcharts, Gantt charts, and timelines are often used to help paint a picture for project stakeholders in this early step.

We’ll go over the basics of project design, lay out the seven steps to create a project design, and provide expert tips to help you better understand the process.

How project design works

Project design is an early phase of the project lifecycle where ideas, processes, resources, and deliverables are planned out. A project design comes before a project plan as it’s a broad overview whereas a project plan includes more detailed information.

There are seven steps involved when creating a project design, including defining goals and using a visual aid to communicate objectives.

The 7 steps of project design

There are seven steps that make up a successful project design process. These include everything from defining goals and baseline objectives to strengthening your strategy to help you stay organized while managing a new project.

Let’s go over each of the steps needed to create a project design.

Step 1. Define project goals

In the first step, define your project goals. To begin, lead an initial ideation meeting where you document the general project timeline and deliverables.

To start, consider the needs of the project and stakeholders. What is it you’re trying to solve? Begin writing a short description of the project and who is involved.

Once you've outlined the basic goals of the project, determine the more concrete objectives in detail.

Pro tip: Use SMART goals when starting your project design to better visualize where you're going. SMART is an acronym that stands for **s**pecific, **m**easurable, **a**chievable, **r**ealistic, and **t**ime-bound.
Read: How to write an effective project objective, with examples

Step 2. Determine outcomes

Next, narrow down the outcomes of the project. These are usually more detailed than the initial goal planning phase and include the specific tasks you will complete during the project.

For example, imagine you're working on a project to add a new landing page to your website. One of your outcomes may be to add an email signup form.

Document the outcomes and major deliverables needed alongside the project goals to begin building a timeframe. It's a good idea to reference popular project management methodologies to decide which one fits the needs of your project.

Pro tip: For complex projects, use the Agile methodology with iterations to break large tasks into short sprints. For more traditional projects, use the waterfall method which provides a thorough step-by-step approach.

Step 3. Identify risks and constraints

Once you've identified the outcomes, consider your project risks and constraints. Evaluate the aspects of your project that could lead to risk in order to prevent wasted resources down the line.

In order to identify risks and constraints, determine the resource management tools, funds, and timeframe needed. Work to resolve these constraints before the project begins by following up with relevant stakeholders and project teams.

Pro tip: Use a risk register to analyze, document, and solve project risks that arise.

Step 4. Refine your project strategy with a visual aid

A project strategy is a visual roadmap of your project. This helps communicate purpose to team members. Create your strategy by choosing a visual aid that you can share with stakeholders.

There are many types of visual aids you can choose from, some of which include:

- Flowchart: A flowchart is a visual representation of the steps and decisions needed to perform a process. Flowcharts are particularly helpful ways to visualize step-by-step approaches and effectively organize project deliverables.
- Gantt chart: A Gantt chart is a horizontal bar chart used to illustrate a timeline of a project. The bars in a Gantt chart represent the steps in the project and the length of the bars represent the amount of time they will take to be completed.
- Work breakdown structure (WBS): A WBS is the breakdown of all tasks within a given project. Project managers use work breakdown structures to help teams visualize deliverables while keeping objectives top of mind.
- Mind map: A mind map is a hierarchy diagram used to visualize projects and tasks. It allows project managers to link deliverables around a central concept or idea such as a specific team goal.
- PERT chart: A PERT chart or diagram is a tool used to schedule, organize, and map out tasks. It can be helpful for complex projects and estimating the time needed to complete tasks.

Since each visual tool differs slightly, the aid you choose is up to your team preferences. While a work breakdown structure that details dependencies works well for large teams, a flowchart works well for smaller teams with less complex projects.

Pro tip: Examine the features of components of each of the visual aids before adding one to your project design. You can do this by reviewing each based on the amount of detail included, usability, and visual appearance. This way you can find the one that best fits your needs.

Step 5. Estimate your budget

Next, estimate your project budget to begin resource allocation. Your budget will incorporate the project's profitability, resources available, and outsourced work needed. It may also be a set number determined by leadership that you'll need to work around when it comes to being able to execute each deliverable.

Your budget may need to be approved or revised based on leadership signoff. Once finalized, you can begin assigning beneficiaries, design documents, and tasks for your project.

Pro tip: When it comes to resource allocation, implementing automated processes with automation software can improve efficiency and reduce project errors.

Step 6. Create a contingency plan

To begin assigning tasks, create a contingency plan. A contingency plan is a backup plan for the risks and constraints outlined earlier in the process. Having an organized plan when issues arise helps to resolve them in real time and streamline efficiency.

To create one, organize your risks using a Gantt chart or timeline tool and determine a plan for each risk. For example, if one of your risks involves materials not arriving in time, your contingency plan may be to source materials from elsewhere or start on a different part of the project while waiting for materials.

Once you've outlined a plan for each risk, you're ready to begin executing your project.

Pro tip: Use Asana to view lists, timelines, and Gantt charts to better visualize your project plan.

Step 7. Document your milestones

For the final step, document your team's milestones. This is done to ensure work is being completed on time and to easily identify inconsistencies as they arise.

You can do this using project management software where stakeholders can access the information and progress. It's a good idea to manage these milestones until the end of the project to ensure tasks are completed on time.

Pro tip: Connect with project stakeholders frequently to keep track of task dependencies and ensure short term goals are met.

3 expert tips to improve your project design

Building a project design that improves collaboration and empowers efficiency is no easy task. Along with the seven steps that make up the project design process, here are a few tips that can take your design one step further.

Keep these three tips in mind when building a project design of your own:

1. Communicate with stakeholders early and often: Communication is key no matter the project you're working on. Collaborating early on in the project can ensure all stakeholders are on the same page and understand the most important objectives. You can do this by leading meetings through the entirety of the project and using workflows to streamline teamwork.
2. Keep your goals top of mind: Connecting your goals to project deliverables can ensure objectives are being met every step of the way. You can do this with the help of timeline software where you can easily connect goals with the work needed to complete them.
3. Use visual elements to track milestones: While a business case and daily to-dos are helpful, visual elements help stakeholders see the bigger picture. From Gantt charts to PERT charts, there are a number of ways to visualize your project work.

Beyond these three tips, always keep your team's best interests in mind. Providing the necessary information and scheduling work within reasonable deadlines will keep your team engaged and efficient.

Use project design to tell a story

Project design is an important piece of executing a successful project. From gathering the necessary information and resources to coordinating with team members, your job is to bring the details to life. With the right project design, you and your team can tackle anything that comes your way.

Take the art of project planning one step further with work management software. From streamlining work to improving visibility, Asana can help your team achieve more with clarity and confidence.