Project Outline

Client: Foundersuite

Project: Goal Planner

Summary: Create a project planning tool that allows Foundersuite members to identify projects (goals), define related milestones for each and identify tasks required to reach those milestones. Goal Planner will provide users with a high-level view of each goal's status including identifying complete and incomplete tasks, task owners and due dates.

Assumptions

Please let me know if any of the following assumptions isn't correct, doesn't align with your expectations or requires further discussion.

- Each Foundersuite ("FS") account allows a member to manage the development of a single startup. The application does not have to support multiple startups per user.

- Goal Planner will be developed using Javascript technologies coded to provide a RESTful interface to allow integration with other FS tools.

- The FS site will manage authentication and provide appropriate user account information available to Goal Planner.

- User accounts data provided by the FS site will allow the goal planner to identify FS personnel with administrative access to the tool.

- Time permitting: FS's current email infrastructure used by other site tools will be available for use by Goal Planner.   If it can't be made available for this effort or if the core feature set would be compromised to incorporate it in the time frame designated, integrated mail services will not be included in the initial version of the application.

Scope of Work

Security

- Only registered FS members will be allowed access to the planner tool.

- FS members may only access their own Goals and associated content.

- *Question:* Does your site currently support multi-user access to a single startup project?

Goal Management

- A member can create, edit and delete any number of Goals.

- Each goal is made up of milestones (sub-goals) having:
    - Description
    - Due Date
- Tasks: Milestones each have a list of 0 or more associated tasks that each have:
    - Description
    - Owner
    - Due Date
    - Completion Status flag
- The user can export milestones and tasks as calendar items in Google Calendar and iCal formats.

Administration

- FS will have the ability to create sample Goals, Milestones and associated Tasks that will be available to members as they define their own startup projects.

- Members will be able to manage their list of project team members available for task assignment.

- All other administration (creating, deleting and editing, tasks, for example) will be available in the goal planning interface.

Interface

- The Goal Planner design will either incorporate assets and elements consistent with FS's brand or be capable of being modified to add them. We will use jQueryUI for many interface elements, having seen that it is a tool already used by Foundersuite.

- Although the design may vary from the wireframe samples provided, screens will be created to allow goal definition as shown and to provide a high level overview of each goal.

User Stories

My understanding is that there will be two kinds of users for Goal Planner. The first will be members of Foundersuite staff who have a role in managing the system. The second are the founders themselves. Each founder managers his or her startup in the system.

If there are other types of uses you expect to see from the system, please let me know so I can determine what we can do in the time allotted for this project.

Miles

Miles is a member of the Foundersuite staff.   He is a domain expert with a strong understanding of best practices in startup operations. His goal is to provide guidance to founder members to help them avoid common pitfalls and identify high value tasks to help their business launches to succeed.

Miles has defined a Media Outreach goal that he thinks would help a member with the PR for his launch.   He has defined a standard set of milestones: "list of story ideas," "create target journalists list," "create pitch materials," "line up intros," etc. and a suggested set of tasks to accomplish each. Miles now wants to add them to Goal Planner to make them available for members.

Miles logs into the Foundersuite toolset and accesses the Goal Planner tool. He navigates to the planner administration screens and selects "template administration." This screen allows him to create a list of possible Goals. He adds "Media Outreach."

Next, Miles lists possible component milestones associated with the new "Media Outreach" goal. He begins with "Target journalist list." He adds it to the system and then adds a list of tasks: "Identify relevant magazines," "Identify relevant blogs," "Make list of writers." Satisfied, he logs out.

The next user that logs in will find "Media Outreach" in the list of Goal templates in the system.

Carolyn

Carolyn has a startup idea that she wants to develop. She has created a preliminary goal list and wants to begin planning her launch. She logs into her account on Foundersuite and enters the Goal Planner tool.

Carolyn navigates to the Goals screen where she begins to document her project list. She begins to enter "get publicity" when she sees that there is a list of suggested goals. "Media Outreach" is on the list. She selects it. Carolyn then begins to add milestones and tasks for each. As she creates each, she reviews the list of defined milestones for Media Outreach. "Target Journalist list" and "Identify relevant magazines" are both similar to items on her

list. She selects them. "Identify relevant blogs" was something she had missed as she brainstormed. She adds it as well.

Intrigued by the helpful list of tasks she found entering her first project, she reviews the entire list of Goals and begins to revise her project list adding more that she hadn't considered and modifying existing ones with additional milestones she thinks will be helpful.

The next morning, Carolyn sits down to her computer and reviews her project list. She crosses off "Identify relevant magazines" having compiled a list the day before and adds "get list of contacts for our PR firm." She adds Tom as the owner of that task, sets the due date and imports the new task into her Google Calendar[1]. Carolyn then modifies that event in Calendar adding Tom as a guest for that event. Calendar emails him a notice.

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[1] Carolyn uses Google Calendar's invitation workflow to communicate the task info to Tom. Apple's calendar has similar "invitation" functionality. Email is not integrated into the system as of this writing. Once we get the core services implemented, we can determine what our options are for email integration, time permitting.