**BEGINNING THE PLANNING PHASE**

**Objectives:**

* Kicking off the planning phase
* Setting and reaching milestones
* Budgeting process
* Identifying and planning for risks
* Documentation

**Things happen during initiation phase:**

* The things motioned in the documentation
* PM gets assigned
* Project goals, scope and deliverables must be approved
* Team members get assigned
* Sign off on your project charter.

**When the above is completed then you move onto planning.**

**Benefits and importance of planning:**

* Understand the work needed to achieve your goals.
* Coordinate efforts and timelines with other teams, contractors, and vendors.
* Identify and prepare for risks
* Get “Buy-in” from key members of the project team
* Demonstrates to the stakeholders that the team Is taking care to start the project with detailed plan.
* Teamwork

**Launching the planning phase**

During this phase these three main things are worked out:

* Schedule
* Budget
* Risk management plan

**Schedule:**

The project timeline, which includes the start date, the end date, and dates for events in between

Using time management methods. ETC

**Budget:**

Total cost, how much needs to be spent on all factors.

**Risk Management:**

Searching for possible problems related to the project and planning to mitigate these risks.

**Schedule a kick-off meeting:**

It is important to have a meeting to formally kick off the planning of the project phase.

This is the first meeting in which a project team comes together to ground everyone in a shared vision, gain a shared understanding of the project’s goals and scope, and to understand each person’s induvial roles within the team.

The people invited are the people identified in the RACI chart from the initiation phase.

They’ll learn how they’ll contribute, gain a deeper understanding how they work together, as well as stakeholders.

People such as:

* Project team (RACI chart)
* Project stakeholders
* Project sponsors

When first planning or kicking off meeting its vital to have all these as to:

* Establish a shared vision
* Align on scope
* Build team rapport
* Ask questions and offer insights
* Set expectations

**How to plan and run a kick-off meeting:**

According to needs of the project,

Example template:

* Introductions (Names, roles)
* Background (Detail about the project, like, how project came to be, why project matters, set a shared vision etc)
* Goals and scope (Clear what work is, in-scope, out-of-scope, target launch date, milestones)
* Roles (What work responsible for)
* Collaboration (Project tools and documentation, communication expectations)
* What comes next (set expectations and action items, clear what actions they take next)
* Questions (Gain clarity, ensure project benefits from diversity thoughts, experience, and ideas.) as well as polling confidence and clarity by participates, 1-5, any areas of doubt, show your there to support in any way you can, practices give strong feeling of support

Once you do this document this in a meeting agenda template and send It to attendees.

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Best practices:

* Ask a teammate to take notes on key points and action items
* Record the meeting so they can re-visit the meeting
* Lead most of the meeting
* After the meeting, send follow up email that summarizes key points and outcomes from the meeting, and any action items to the attendees.
* Invite attendees to reach out if they have any additional questions