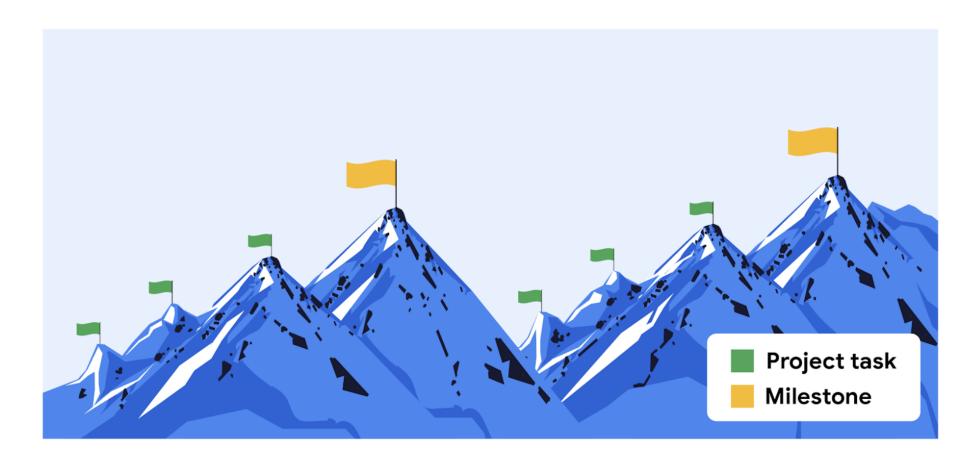Setting milestones: Best practices

You have learned what milestones and tasks are and when, where, and how you will use them as a project manager. In this reading, we will explore best practices for setting milestones. But first, let's revisit the definitions of tasks and milestones.

A **project task** is an activity that needs to be accomplished within a set period of time and is assigned to one or more individuals for completion. The work of a project is broken down into many different project tasks.

A **project milestone** is an important point within the project schedule that usually signifies the completion of a major deliverable. Milestones are significant checkpoints in your project, and keeping track of them helps ensure that your project is on schedule to meet its goals.

Set tasks to identify milestones

Setting tasks can help you clearly define milestones. You can do this in two ways:

. **Top-down scheduling:** In this approach, the project manager lays out the higher-level milestones, then works to break down the effort into project tasks. The project manager works with their team to ensure that all tasks are captured.

. **Bottom-up scheduling:** In this approach, the project manager looks at all of the individual tasks that need to be completed and then rolls those tasks into manageable chunks that lead to a milestone.

Most projects have many tasks that lead to milestones. For instance, if your milestone is to receive approval on the first draft of an article that you are writing, you might complete tasks such as "develop outline," "write first draft," and "send to the editor." Then, you may have another set of tasks to achieve before reaching the milestone of revising the article. Milestones serve as check-in points along your project to make sure that you are headed in the right direction toward the end goal. Milestones also make projects more manageable.

Integrate milestones into your project schedule

There is not a consistent number of milestones in every project. Some projects will have a few milestones, while others may have dozens. Rather than aiming to hit a certain number of milestones, try to set milestones for the most important events in your project. Review your project schedule and identify important moments or checkpoints. In other words, pinpoint where in your project you will achieve major goals and make those points your milestones.

Milestone-setting pitfalls

Here are some things to avoid when setting milestones:

Don't set too many milestones. When there are too many milestones, their importance is downplayed. And, if milestones are too small or too specific, you may end up with too many, making the project look much bigger than it really is to your team and stakeholders.

Don't mistake tasks for milestones. Remember that milestones should represent moments in time, and in order to map out how you will get to those moments, you need to assign smaller tasks to each milestone.

Don't list your milestones and tasks separately. Make sure that tasks and milestones can be visualized together in one place, such as a project plan. This will help ensure that you are hitting your deadlines and milestones.

Key takeaways

Your approach to setting milestones may differ from project to project, but most projects will have at least one milestone and several smaller tasks associated with each milestone. Setting clearly-defined, distinct tasks, and milestones, integrating them into your project schedule, and using a tool that visualizes them together will help organize your project and drive it forward.

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