

# LEVEL UP PROJECT PLANNING

SUCCESS STRATEGY



**LEVEL UP**  
STRATEGIES

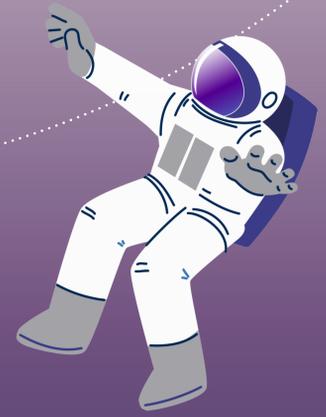
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SUCCESS STRATEGY



Is it true that if you fail to plan,  
you plan to fail?



Has anyone ever  
planned ahead, and  
failed anyways?



Projects often fail because planning:

1. Takes place in a sterilized headspace outside of true reality,
2. Often doesn't involve the people who are going to do the work, and
3. Is based on impersonal targets in an idealized world.

Instead, transform your project outcomes with these 5 potent questions!

## 5 Level Up Project Planning Questions

- 1 What are you trying to accomplish? *(In 1 elegant sentence)*
- 2 How will we know we have succeeded? *(Definition of "done" with success criteria)*
- 3 What is going to get in our way?
- 4 What are we going to do about the things we expect to get in our way?
- 5 What could we do to enhance the process of achieving our goals?



Let's unpack these 5 key questions using the context-based example of JFK's ambitions to go to the moon!

### 1. What are we trying to accomplish?

*"We choose to go to the moon...in this decade and do the other things, not because they are easy, but because they are hard; **because that goal will serve to organize and measure the best of our energies and skills**, because that challenge is one that we are willing to accept, one we are unwilling to postpone, and one we intend to win, and the others, too." —[John F. Kennedy](#)*

### 2. How will we know we have succeeded? (Definition of done with success criteria)

- ◆ Astronauts will interact with the moon for the first time in history.
- ◆ Astronauts will arrive safely back to earth.

### 3. What is going to get in our way?

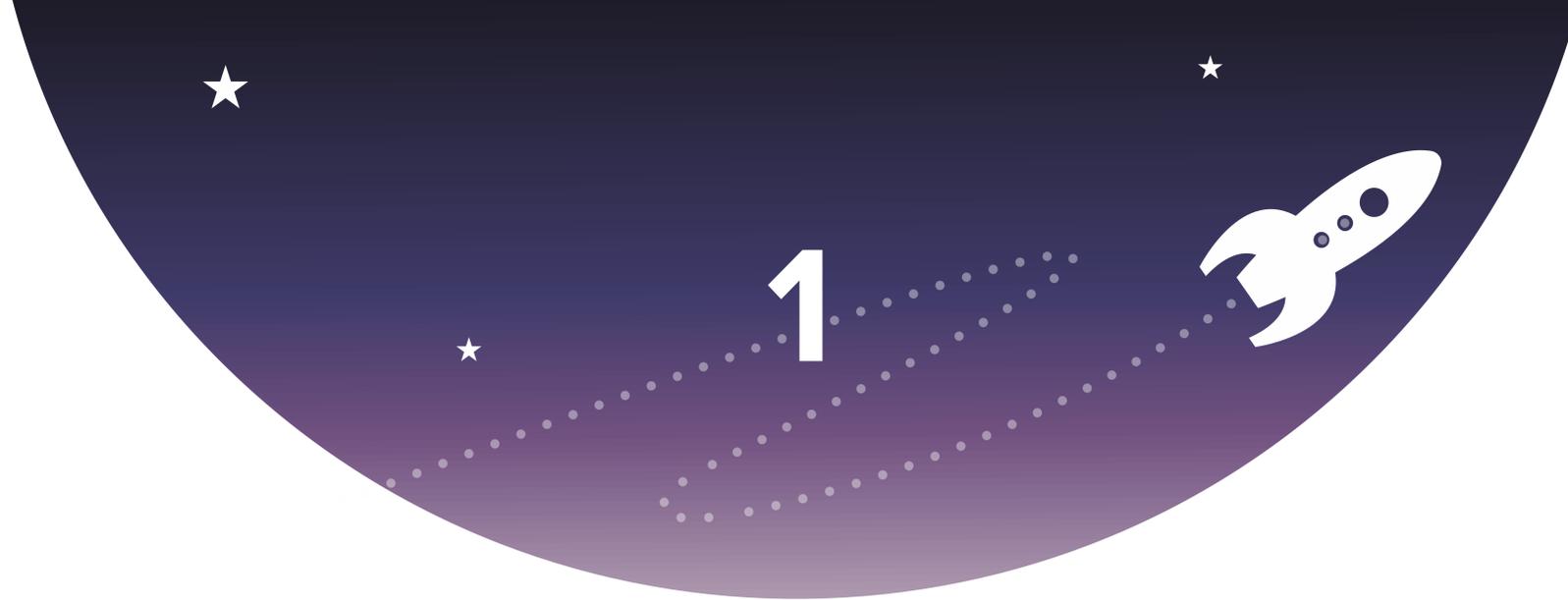
- ◆ Unknown hazards of space
- ◆ Zero-gravity changes how people are able to move
- ◆ The great distance and time to travel to the moon
- ◆ Limitations in technology
- ◆ Uncharted territory of space travel
- ◆ Complicated math to ensure trajectories through space
- ◆ Unknown cost to achieve lunar space travel

### 4. What are we going to do about the things we expect to get in our way?

- ◆ Adapt our current technology to resist the vacuum of space
- ◆ Train underwater to simulate zero-gravity
- ◆ Run a series of high-altitude tests on equipment to validate durability
- ◆ Recruit the best scientists and pilots to develop viable space craft
- ◆ Secure support from congress to supply enough financial resources to try and fail until we succeed

### 5. What could we do to enhance the process of achieving our goals?

- ◆ Collaborate with other countries to reduce the risk to life and decrease the expense of duplicated learning
- ◆ Build a dedicated training facility to help pilots specialize in navigating the challenges of zero-gravity
- ◆ Dissolve our gender and race-based segregation policies so we can recruit the best minds to the team \* [Hidden Figures](#) by [Margot Lee Shetterly](#)



## **What are you trying to accomplish?** *(In 1 elegant sentence)*

Let's expand on this

The power of an orienting sentence is the rally cry of the project that substantiates the reason to undertake this work in the first place. Think elevator pitch. There is no limit to the size and scope of this question.

**Note:** If the goal is not worth clearly articulating in relatable language that is compelling to all stakeholders, it may not be worth undertaking...

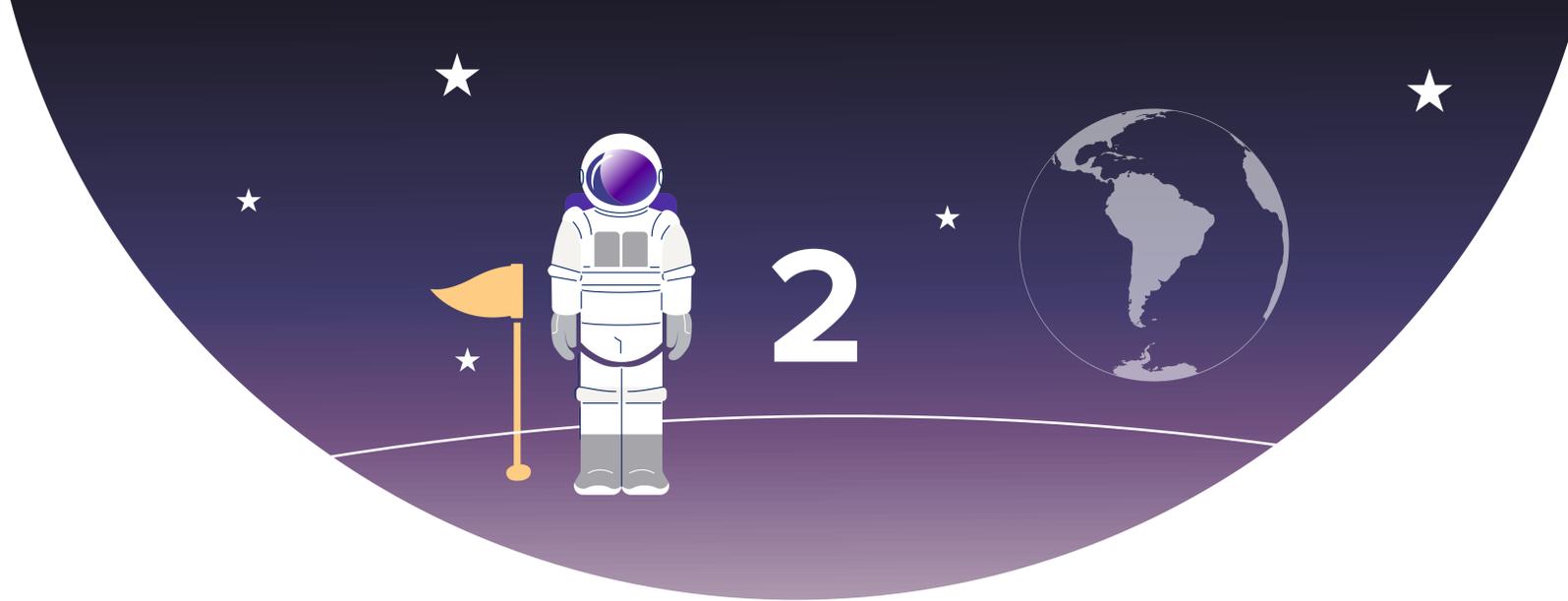
- ◆ For annual strategic planning begin with 4 sentences (one for each quarter) that outline the company's goals for the year.
- ◆ Each quarter you might have 8 sentences (one for each department) that all build into the main overarching goal for the quarter.
- ◆ Each department might have 15 sentences (correlate to individual projects) that substantiate the department's contributions to the success of the organization for that quarter.
- ◆ No matter the granularity, the 5-question framework applies; the value of a clear and compelling sentence is paramount.

**Note:** This initial question should provoke the distillation of the central focus for the whole team to maintain motivation, engagement, and rally support from other departments/stakeholders/organizations to join the cause as required. Take the time required to clarify this sentence!

Few people will want to spend their best effort to simply "Boost sales by an arbitrary 10% this year so shareholders can get more profits!" but people may be motivated to "Boost revenue by 10% so we can afford to extend a comprehensive benefits package for all employees in the company."

### **Consider these comparisons:**

- ◆ "Boost client retention." vs. "Enhance our services to deliver so much value to our customers that they can't imagine working with anyone else."
- ◆ "Expand our market share by 5%." vs. "Become an indispensable resource for our customers success."



## How will we know we have succeeded? (Definition of “done” with success criteria)

Let's expand on this

This is critical because it defines the finish line and attributes of success. It is as much a part of multi-directional accountability to make sure the goal post doesn't move as it is a quality assurance tool to establish the expectations of a complete/successful project.

The age-old “we are never done improving” is a prehistoric and demotivating paradigm that will propel the best people away from dedication and focus, just as “I thought that is what you wanted” is a disappointing justification for everyone counting on another group to deliver more than they did.

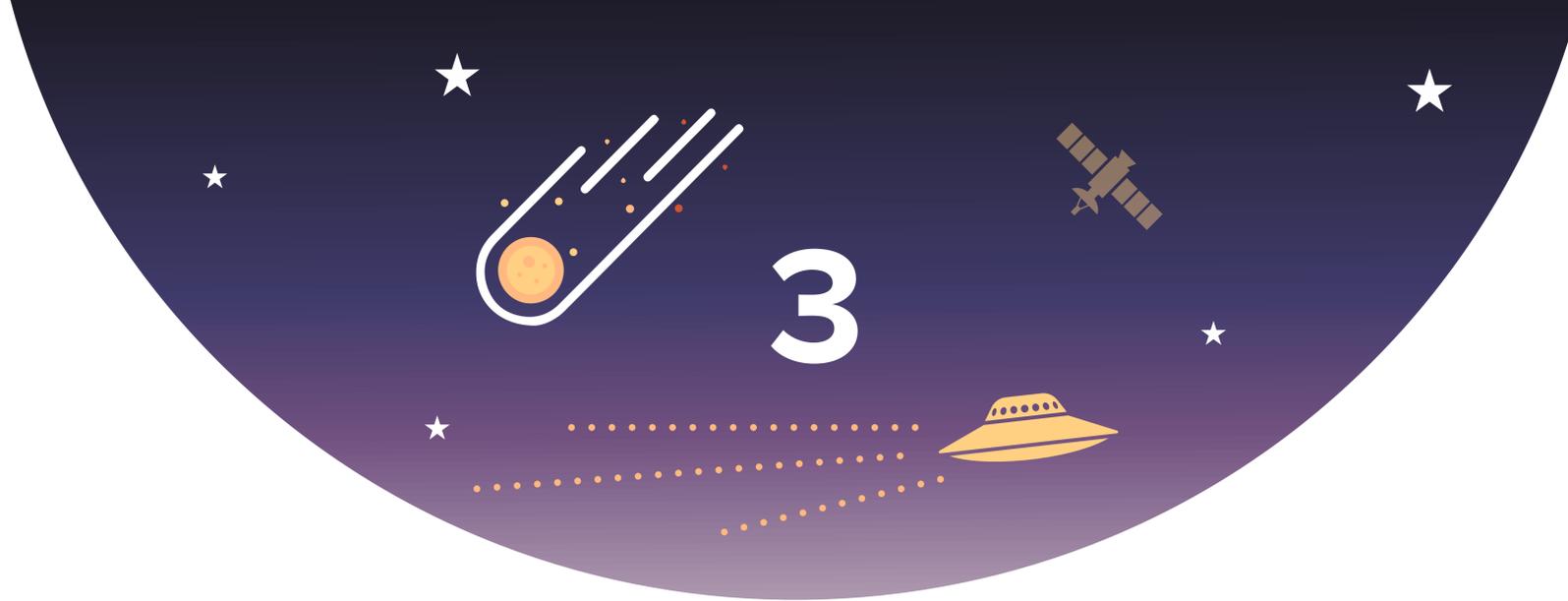
Set **SMART** goals if your organization is used to that, or define specific measurables that matter to your project like dates, number of clients, feature lists, involvement metrics, budgets, etc.

**Note:** Ensure goals have specific, measurable, achievable, realistic, timely tangible outcomes. There is no room for fantasy in establishing meaningful success criteria. Specifically describe how will you know you have succeeded? When can you stop/regroup/celebrate/move on to the next objective?

### Example

We will have succeeded at “becoming an indispensable resource for our customers success” when:

- A. Three of our top five clients (name them 1,2,3,4,5) renew their contracts with us for another year.
- B. We will have done weekly rotating billboard marketing campaigns in the urban centers of New York, Shanghai, and Winnipeg until our July 9th go-live date for our new product launch.
- C. VP of Sales will have in-person meetings with our top ten clients to understand their needs for the next year – by 1 week prior to Q2 board meeting (June 16<sup>th</sup>).
- D. VP of sales to have in-person meetings with five of our top ten prospective clients to introduce our services and ask what is most important to them – by 1 week prior to Q3 Board Meeting (Sept 9<sup>th</sup>).



### **What is going to get in our way?**

*How do we “become an indispensable resource for our customers success?”*

Let's expand on this

This is the foundation of Risk Mitigation and can save an organization time and money because you are thinking ahead rather than discovering the problems as you bump into them along the way.

Poorly planned projects result in teams being forced to adapt on the fly to things that could have been anticipated if they had set an intention and were given time to consider them. The context switching from ‘making progress’ to ‘fighting fires’ wastes valuable resources and motivation within the team.

Asking “What is going to get in our way?” draws on significant internal awareness and intuitive knowledge that often lays dormant or under-utilized within an organization.

**Note:** This is where all the organizational learning that has been accumulated will pay dividends, because you will be able to anticipate what is yet to be discovered, and this may very well be a strategic advantage for your organization.

#### **Example**

Things we anticipate may get in our way of succeeding at “becoming an indispensable resource for our customers success” are:

- A. Our top clients may be using other programs that aren't compatible with our current product set, so they may be considering switching away from us.
- B. Clients may hesitate to or not want to meet in person.
- C. Distributed teams may make it hard for us to remain focused on hitting deadlines and delivering bug-free products.
- D. The VP of Sales has a 2-week vacation planed next month.
- E. The COO often asks our team leader to “urgently help” with an issue that he is working on, which means they are randomly gone for days at a time.
- F. New products might be buggy until they are worked out in real world testing.



# 4

**What are we going to do about the things we expect to get in our way of “becoming an indispensable resource for our customers success?”**

Let's expand on this

Having taken the time to anticipate, it is now essential to consider what can reasonably be done to mitigate the impact of the things (items A-F above) that were brought forward. Awareness without responsible action is pure waste!

**Note:** You won't see every obstacle for a project. Nonetheless, shining a light on 80% of the obstacles you are inevitably going to bump into is a powerful asset towards avoiding interruptions to the overall plan. Alternatively, the team may simply choose to build an alternate plan and adapt project expectations to be more realistic based on their cultivated insights.

### Example

Proactive plans to address anticipated problems along the path to “becoming an indispensable resource for our customers success”:

- A. - Create a comprehensive list of our current product integrations.
  - Do a detailed review of the most utilized, cutting edge products in our client marketplace, and report back on where we have gaps to inform our development roadmap (due 2 weeks from today).
- B. Purchase license to webinar platform that allows high-quality digital collaboration for clients who cannot meet in person.
- C. Employ an Agile burn-down chart to track progress on our release deadline with our distributed team. (Product Owner will champion the Agile chart)
- D. Train our Regional Sales Manager to facilitate meetings for clients while the VP is on vacation (VP to make introductions prior to the scheduled vacation. Perhaps Regional Sales Manager can share load of perspective client interviews going forward?)
- E. Establish consensus with the COO that the dedicated development team is not to be pulled away until 1 week after the launch date (July 9<sup>th</sup>).
- F. - Set up a test-first development strategy for our mission critical features.
  - Set up a 24-hour customer support hotline for our enterprise level clients.
  - Bi-weekly review of the most prominent bugs in our products – with a team dedicated to targeting the issues until they are resolved.



**What could we do to enhance the process of achieving our goals**  
to “becoming an indispensable resource for our customers success?”

Let’s expand on this

Often times, the underlying issue with a project is the team having sufficient time and resources to complete the workload. Considering the systems and processes that support or hinder work will empower a team to evolve, accelerate, and succeed.

**Note:** Achieving “the goal” and burning out your team in the process will hardly be experienced as success by the people entrusted with the project.

**Example**

The items listed below may be helpful to “becoming an indispensable resource for our customers success”:

- ◆ Old and slow hardware can double the processing time of tasks. A simple and cost-effective upgrade of hardware can mean a significant boost to the productivity of the whole project team.
- ◆ If working collaboratively is the goal, perhaps reorganizing desks or taking down cubicle walls are the only structural changes needed to ensure these goals become the reality.
- ◆ If the goals are particularly ambitious, prioritize employee wellbeing to ensure people and productivity don’t decay along the path towards success. (Ask the team what would matter to them.)