



NAME: _____

TEAM MEMBERS: _____

Identify and Sequence Tasks Tip Sheet

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The key to a successful project timeline is threefold: be organized, be realistic, and stay on track. Of course, even the best laid plans can go awry, but by allowing extra time for tasks and having contingency plans in place, you will be setting your team and project up for success. Hold a planning session. Each project timeline will be different and specific to the service project the team is planning, however there are tips and processes that are universal. Use the following tips to help identify and sequence tasks.

1. Define activities, tasks, and resources required.

This may be difficult to start, but hold a brainstorm session to get the ball rolling quickly. Begin by creating an exhaustive list of all the activities and tasks you may need to complete to get to your end goal. As you develop this list, make note of the resources or people you will need to complete each activity or task. Work as a group, or create independent lists, then bring the lists together to create a master list, which will take time. Review the master list regularly in the first stages of planning as you learn more about the needs of the project. As you think through the list, be detailed and do not take anything for granted. Something as simple as “get paint” can involve a series of tasks and decisions.

For example:

- a. Find vendor who will donate or discount the paint and supplies
- b. Determine paint colors and create list of associated supplies
- c. Arrange a pick-up time for the paint and related supplies with the vendor
- d. Get paint

2. Determine the order of the activities and tasks.

Working from the master list, categorize the activities and tasks. Options on how to organize can include color coding tasks by role, type, or stage of the project. Write each task on separate cue cards, sticky notes, or in a table or spreadsheet. Include a title and details of the

task including the lead team member for each task. Begin laying out the timeline by moving around the cue cards or sticky notes, allowing for some to overlap as different team members take on different tasks during the same time period. When determining the order, keep in mind the end goal. It is often easier to work backwards from what you want to accomplish.

3. Estimate time allotments. Before committing tasks to dates on the calendar think about how long each task will take to complete. Build the schedule around key deliverables. This is another time working backwards from the end will be helpful for figuring out how much time you have or will need to complete each set of tasks. Note what dates cannot be changed and which ones are more flexible. Expect changes and include buffer time while still working toward the original timeline.

4. Include check-in points. Set regular timeline check-ins for team meeting agendas to ensure milestones are being met and to adjust where needed. Check the availability of team members at the beginning of the project, but also at team meetings to safeguard task completion.

5. Include roles and responsibilities. Identify key team players for each task but also outside contributors. Include lists of resources needed to complete the tasks so that everyone is clear about requirements before the due date approaches. Make the timeline accessible to all team members. While each team member needs to know what is expected of them, it is also important that everyone sees the bigger picture so that they may support other team members.

Project timelines can be time intensive to create but will be well worth it as all team members will gain a greater clarity of team goals, objectives, and responsibilities. With the tips from this sheet, rework your timeline as needed.