

EXAMPLE

DATE AND FOR WHAT PERIOD OF TIME? _____

You have a number of things you want to do. Some you have started, some still to get underway. The Project Planner below can be used to progress these matters. The Project Planner can be employed in various ways, including as a tool for brainstorming, a starting point for testing an idea or to just do a brain dump.

① WHAT PROJECTS HAVE YOU ON THE GO?	② WHY DO YOU WANT TO DO THIS? WHAT IS THE PAYOUT?	③ WHO IS INVOLVED AND WHAT NEEDS DOING TO PROGRESS THIS PROJECT?	④ WHAT ACTION NEEDS TO BE TAKEN AND BY WHOM?
New division to the business; Product Development 2.0	Needs to make a profit to be workable and saleable	All directors, plus finance manager	New budgets and sales plan to be worked on
New division	Needs to be competitive and appealing	All key directors	Presentation to advisors of key plans
Marketing campaigns for the business	We need good content going out regularly, grow customer awareness	MD and marketing consultant	Keep close to MD and marketing consultant
My role as FD	I enjoy my role here and want to keep my hand in	Me, PA, entire team	Reduce my client bank to 50 clients to ensure time can be managed effectively
Participate in social networking groups or online forums	Meet new like minded people. Share ideas and gain a wider understanding of the market space	PA, myself	Research communities, make new connections