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Preparing Your Workplan: Initial Steps

As you prepare your workplans, you are not only planning your work for the next few months--and making sure it's all feasible--but you are also beginning to build a relationship with your hosts and setting up your team's working norms. Here are some thoughts to help you in this process

Prepare for the initial host conversations

You'll be talking with your hosts to gather the information necessary to create your project workplans. As you go into these conversations, make sure you are prepared. Ask yourselves:

- Have we done our homework? E.g., have we each read (and re-read!) the project proposal? Have we looked at their website?
- Can we describe the problem or issue we are to address?
- What do we know about the context—the industry or market, for instance? The customers or recipients of the product or service?
- What do we know about the organization?

You should make sure you have discussed all the areas listed above, as a team, before you start any in-depth discussions with your hosts.

Team habits

Your early team meetings offer you and your colleagues a chance to build up the team habits that will help you work effectively. Preparation, timeliness, follow-through, participation, and information sharing are all areas in which the right habits make all the difference. Your team norms—of everyone being prepared with written notes to share, for instance, and of everyone contributing to discussions, together with habits of starting and ending on time—will make a big difference in your team effectiveness. This is your chance to start off right!

Focus on the key questions, and keep track of others

Now, at this point, you'll have many questions that are still unanswered. This week, you should start listing these open questions. The reason to do this is to make sure you are gathering the relevant data—something we'll talk about in class on Wednesday—and focus on the key issues while trying not to overwhelm your contacts with questions. If not now, at some point in your project, you will realize that you have more questions than you can address. At the early stages, sorting out which questions you will focus on, and which ones you will set aside, is an important step in scoping your project plan. Later in your project you will use the same process to maintain your project's focus (and avoid the dreaded scope creep!) or to renegotiate the project's scope (but that would be only after careful consideration and conversation with faculty and host).

Project workplan

Of course, these questions are important because in answering them you will be working towards your project's goals. **This is the week to be clarifying these goals and the specific objectives that you will reach by early May.** The workplan that you hand in on March 7 is essentially **a contract between you, your team, the hosts, and the SLab faculty for what you will do**—both the **product** that you will share with the hosts and the faculty, as well as the **key steps you will take to generate that product.** It sets out an agreement that you are expected to adhere to.

To start generating your team workplan: describe the final product, with all its components, that you will give to your hosts in May. Then, as a team, list all the steps required to produce that product. Use your conversations with your hosts to refine this plan, and use your team meetings to sort out what the order of steps should be and to assign specific responsibilities for the steps to team members. The result can take the form of the well-known Gantt chart, or some other method of systematically representing project steps. It needs to be specific enough that you can test how much progress you are making at any point in time. It also needs to be well-thought-out, so that it can guide your work as individuals and as a team. It will also help to structure your interactions with your team, your lead faculty, and your host. It's definitely very important!

What will you do every week?

We'll talk about this question in class on Wednesday. Your team will work on a key step or two every week, of course, but you will also want to put in place some regular practices, such as a weekly update, that can help you stay on track, keep others informed, and will allow you to generate and gather the materials you will need for your final report. An important part of the plan is your method for keeping in regular contact with your hosts and your faculty lead. We'll ask all of you share some ideas for doing this in our next class, so come ready to tell us what has worked for you in the past.