

# Project-Assistant + ChatGPT Deliver Successful Projects in Six Steps

## Overview:

These six steps include the best practices needed for typical business projects. Experienced professionals use it as a refresher and a foundation for training new employees. This is not intended to be all-inclusive but a foundation. Feel free to copy and customize it for your organization.



## Step 1. Review the Guiding Principles:

These principles formed the foundation for designing Project-Assistant's features and are explained in the steps below.

- Simplify by creating smart templates for your typical project types.
- Improve project results when starting with smart templates.
- Produce clarity by developing written plans with help from ChatGPT.
- Project teams succeed when following a custom workflow.
- Uncover all project work using the three-level structure.
- Remain competitive by continuously updating your smart templates.

## Step 2. Select a Smart Template:

Don't start projects with a blank slate. Have a general project structure in mind before starting. When writing a book, successful authors begin with a general outline. Successful professionals start proposals, presentations, training, and even emails with an outline either formally defined or in their mind.

In Project-Assistant, all projects start with a smart template. Become familiar with the public and private templates that you can access. Templates are built within a three-level structure with a project workflow in the first column. The workflow's work packages are applied across the solution deliverables. The workflow contains project planning and management, while the solution deliverables are what will be delivered.

### **Step 3. Begin Following the Workflow:**

Begin your project by following the template's workflow in the first column of the three-level structure. Document the project plan as you progress through the project. Notice what doesn't fit your current project and may need to be customized. The purpose of the workflow is to produce clearly defined project solution deliverables. We recommend asking ChatGPT for its suggestions for each item in the workflow and integrating its responses with the teams.

To appreciate the power of using our smart templates, recognize that the projects you and your organization do are not an unlimited universe. The types of projects you do are directly related to your organization's purpose. If you are in healthcare, you're not building houses; if you are in a financial services organization, you're not developing software, etc. Organizations, regardless of their size, typically do ten to fifteen types of projects. Most small-midsize organizations will have about ten project types.

Do this short exercise to identify your project types. Gather a small team, in person or remotely, and brainstorm or review a list of the active projects over the past 12 to 18 months. Next to each project, list its type, i.e., process improvement, new product introduction, etc. Create a separate list of the project types. Now go back a second and third time through the list of projects and types, looking for ways to combine types and update your list. Now list the known and potential projects that will need to be done over the next 18 months and determine their types. Update the list of project types and come back and review the list after a few days. You now have a list of project types.

There are no right or wrong answers when defining your project types. When you're ready to create custom templates, start with your initial working list. As templates are designed and used, your project types will evolve.

### **Step 4. Customize the Workflow:**

As you work on your project and understand the need for planning and management work that applies across the project, add predefined work packages from the library or define custom work packages for the workflow.

Typical workflow customization may include stakeholder management, budget, risk management, metrics, reporting, etc. As you customize the workflow, update your

written project plan. Documenting and sharing written words will help clarify your project. By continuously reviewing and updating project workflows in custom templates, you will be establishing your best practices for doing projects. Just as you need defined workflows for running your business, you also need defined workflows for changing your business.

### **Step 5. Build Solution Deliverables in Three-levels:**

Projects produce deliverables. A deliverable is a thing, and the label at the top of the column on the project scope page should be a noun. The first column deliverable is the project's workflow. The other columns contain the solution deliverables.

Work packages are entered below the deliverable. Work packages are a broad description of the work required for producing the deliverable and should start with a verb. Combine similar work assigned to an individual or team into a work package. This provides a framework for customizing the tasks for the people to be assigned.

The tasks accomplish the work described in the work package and should start with a verb. When a beginner needs detailed work steps, enter them as individual tasks. Experienced team members may understand the work described in the work package and not need as many detailed tasks.

The three levels are deliverables, work packages, and tasks. When you use less than three levels, work is usually missed, which increases the probability of surprises, increased time, and missed deadlines. Using more than three levels becomes complex to understand and manage.

The most effective way to ensure successful projects is brainstorming, identifying, describing, and verifying all the project's work within the three levels. The three-level structure displayed on the project scope page is called the Work Breakdown Structure (WBS). It breaks down the work. It's a powerful visual tool for viewing the entire project to identify and organize all the work.

### **Step 6. Manage the Commitments:**

All projects must have one individual identified as the project manager or team leader. All business projects should also have an identified sponsor. The sponsor sets and or approves the project's direction, provides resources, and makes final decisions.

Develop and share a vision of what the project is expected to produce and what it will feel like when successfully implemented. Constantly communicate the problems to be solved and the solutions. Help all impacted individuals and teams understand the problems in the current state and the benefits of the future state.

The project manager defines, establishes, and develops the project team. Large projects may require multiple sub-teams that operate under the direction of the core team. The core team members are involved for the project's duration, while the sub-teams may only be required to do specific work and then disband.

The project manager establishes the project's norms, operating procedures, administration, tools, and workflow. Experienced project managers will continuously look a few steps ahead to reduce surprises and ensure smooth progress. They recognize that not all work may be completed within the project and ensure they understand and focus on the critical work that must be completed. Ultimately the organization's culture will determine what gets done or not.

Project managers monitor and update the plan, assign, and track the progress of all work, schedule and facilitate meetings, communicate with stakeholders, and share the status with management. Project sponsors and customers typically underestimate the administrative work of running a project.

**Conclusion:**

Don't start projects with a blank slate. Start with a smart template. Don't wing it. Follow a workflow or process. Don't let workflows become obsolete. Customize and continuously improve the workflows for your organization's projects. Don't use to-do lists – organize work in three levels. Don't expect everything to go as planned – expect disagreements, lead, facilitate collaboration, and manage the project.

This has been a summary of our six-step project roadmap. Feel free to customize it by expanding the content, adding more topics, and including your organization's requirements.