

LEAD WITH RESULTS



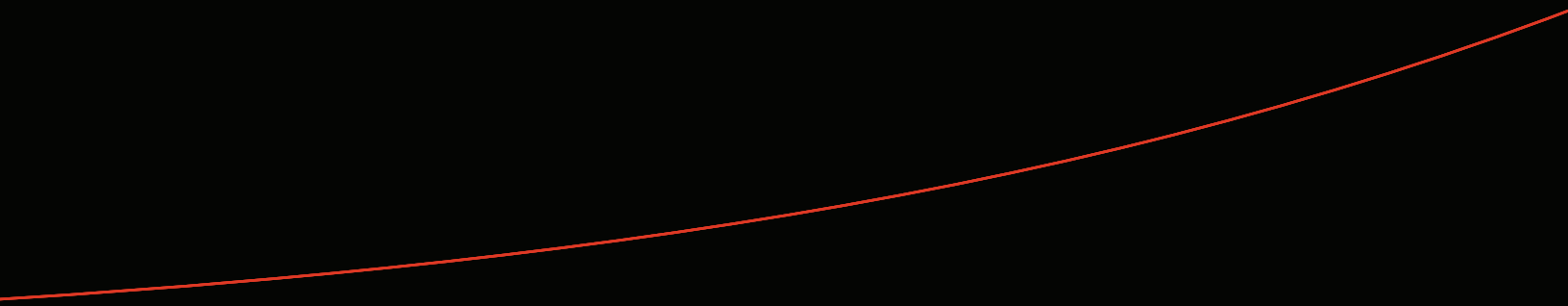
PARTICIPANT WORKBOOK

Leadership By Design

Corporate & Continuing Education & Learning Experience Design Team



HUMAN- CENTRED PROJECT PLANNING



WELCOME!



Buckle up for a journey into human-centred project planning. “But, wait?”, you might be thinking. “Aren’t all projects planned with and for humans?” Not necessarily! And, let’s face it—even if they start out that way, as solutions for real needs, sometimes projects become more about the project planners than the actual beneficiaries. In this mind-shifting workshop series, we’ll apply the five phases of **human-centred design** to ensure projects are **feasible** (doable), **viable** (sustainable) and **desirable**. With human-centred project planning, you’ll go beyond ensuring results are delivered on time and within budget to ensuring deliverables are downright delightful! Sounds like a tall order, doesn’t it? No worries.



Anyone Can be Creative
increase confidence, potential

What is the...

Don't get ready - get started!

Experience Your Way to Success

Tackle a "doable" project

You can't be the best at something on your own

Adopt a...

GOALS & THEMES

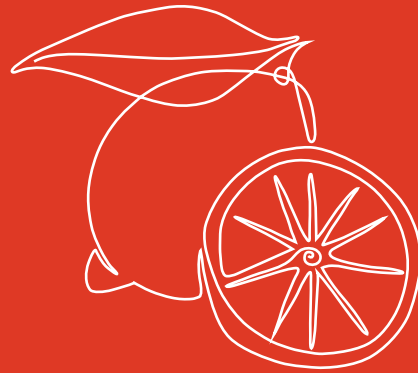
OUR APPROACH

With our apprenticeship approach, you'll practice each step of human-centred project planning in class with a team as you work through project-planning case studies from the local Lethbridge area.

Upon successful completion of this workshop series, you will be able to:

- align project goals with stakeholders' needs
- recruit and engage multi-disciplinary project teams
- create project plans to ensure deliverables are feasible, viable and desirable
- respond creatively to risks and constraints
- delight stakeholders and inspire decisionmakers with project communications

INGREDIENTS FOR SUCCESS



FRESH

Modern methods
drawn from today's design leaders
with locally-sourced applications.

PLAYFUL

It's going to be a lot of fun.
Maybe even a bit silly at times.
Besides, even Einstein said
"Creativity is just intelligence having fun"!

STIMULATING

In our office, when we see
design thinking in action, we get
the "nerd shivers". For reals.



RELEVANT

If you haven't applied a single "take-away" in like...100 days, you'll get a full refund!

*Some restrictions may apply.



TANGIBLE

Stuff is going to get real and you'll leave with loads of tools and templates.



PACKAGED AS 100% RECYCLABLE!

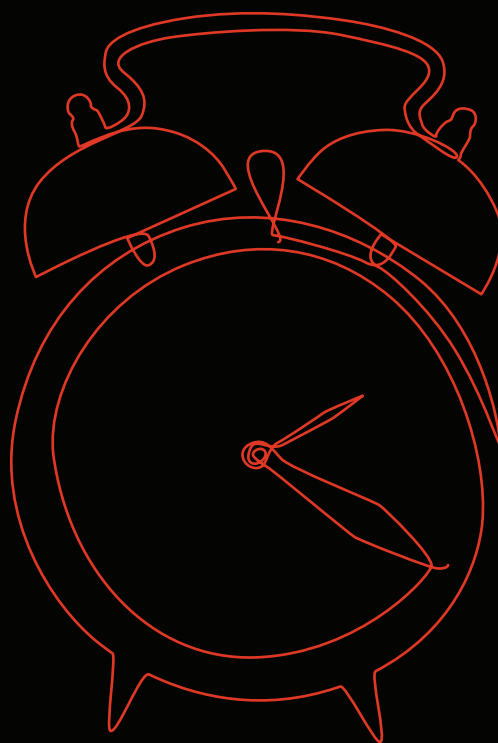
Please use, adapt and share any of our workshop material. Just give us a shout-out if you do.

COLLABORATIVE

Arranging post-it notes by yourself is just sad.



SCHEDULE



WORKSHOP **1**

DEFINING DESIRABILITY

What to expect:

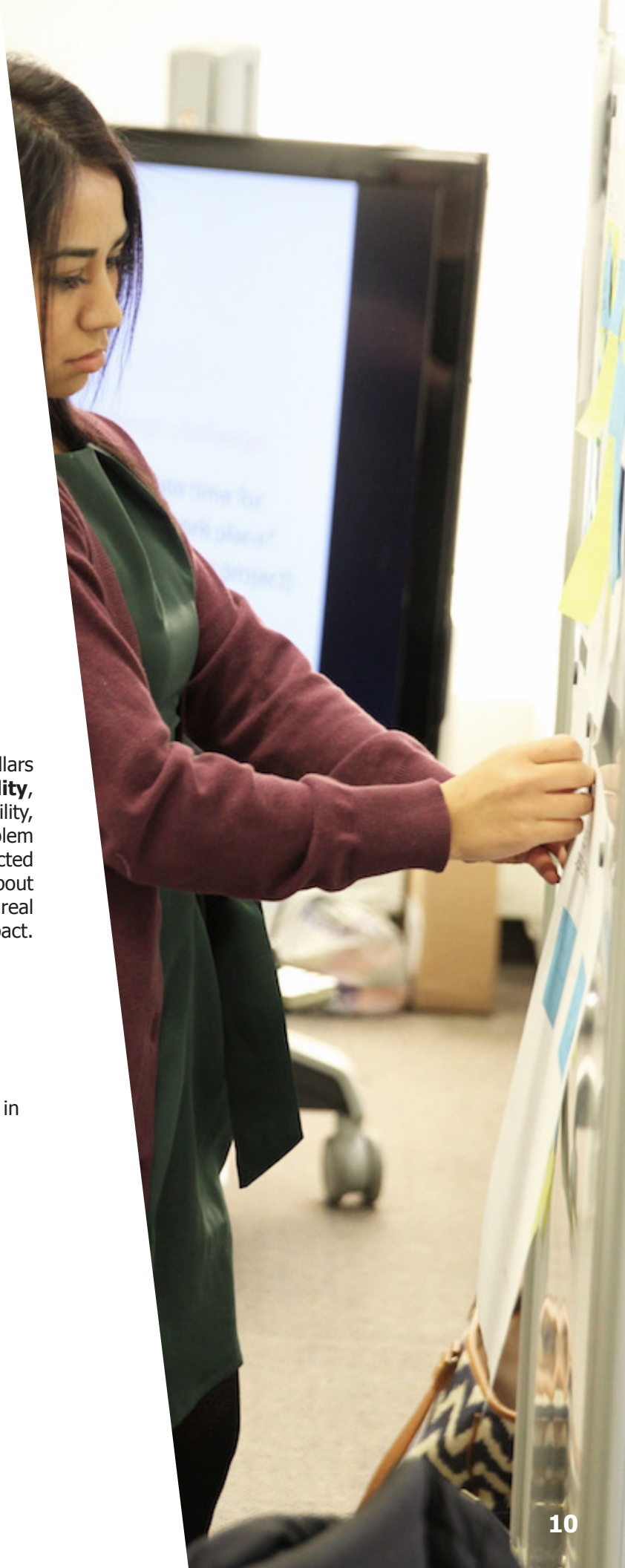
In this first workshop, we'll introduce the three pillars of human-centred project planning: **desirability**, **feasibility** and **viability**. Beginning with desirability, you'll practice strategies for identifying the root problem or need prompting your project, the people impacted and the results your stakeholders desire. It's about putting legs on the right project—one that meets a real human need and results in measurable positive impact.

What to bring:

1. Enthusiasm and openness to learning a new approach to project planning
2. An idea for a project that you'd like to develop in your own work context

What you'll take away:

1. A strategy for aligning project goals with stakeholder needs
2. A process for identifying potential impacts
3. Everything you need for writing a Project Brief



WORKSHOP **2**

DEFINING FEASIBILITY

What to expect:

Once you've dialed in your project for maximum impact on real humans, it's time to assemble a team with the right **skills** and **knowledge** to pull it off! During this highly interactive session, you'll discover the ideal mix for a project team. Hint: it's not about position titles! Then, you'll practice strategies for fostering ownership, initiative and accountability within your team.

What to bring:

1. A draft Project Brief
2. An understanding of your preferred team role(s)

What you'll take away:

1. Strategies for recruiting and leading effective project teams
2. Processes for aligning group efforts for maximum impact



WORKSHOP **3** *DEFINING VIABILITY*

What to expect:

In a nutshell, expect a bit of a mind-shift. With human-centred project planning, it's not just about ensuring results are delivered on time and within budget—it's about ensuring **delightful results** are delivered **on time** and **within budget**! Sounds like a tall order, doesn't it?

What to bring:

1. Stories to share about project team building in your own workplace
2. Flexible thinking as you learn to balance project constraints with desirable results

What you'll take away:

1. A new approach to project planning that addresses sustainability while maintaining desirable results!

WORKSHOP **4**

MAXIMIZING OPPORTUNITIES

What to expect:

In this workshop, you'll get down to the nitty gritty of project planning as you **balance** feasibility, viability and desirability with the help of the Project Planning Canvas. You'll also hear from a panel of local project planners as they share their strategies for leading high impact projects.

What to bring:

1. An analytical lens for project planning
2. A completed draft project plan for your workplace project

What you'll take away:

1. Strategies for using and adapting the Project Planning Canvas in your own context



WORKSHOP 5

MINIMIZING CONSTRAINTS

What to expect:

Some might call this the “dark side” of project planning, but if you’ve ever managed a home renovation, for instance, you know that *stuff* happens! Every. Single. Time. So why not plan for it by identifying your **riskiest assumptions** and **potential constraints**? This is proactive creative problem-solving, which will prepare your team to pivot without losing sleep!

What to bring:

1. A completed draft Project Planning Canvas for your workplace project
2. A creative lens for identifying contingency plans and “work-arounds”

What you'll take away:

1. An acceptance that project planning means planning for the unexpected
2. Strategies and creative confidence for pulling off the “pivot”!

WORKSHOP 6

COMPELLING COMMUNICATIONS

What to expect:

This final workshop is all about telling the story of your project. It's about **inspiring your stakeholders** and decision-makers with compelling narrative, visuals and data. After analyzing various project "stories" for their most compelling elements, you'll learn simple DIY strategies from experts in visual communication, tips for turning your project updates from "Blah to Blam"!

What to bring:

1. Artifacts related to your workplace project (e.g. data, Project Planning Canvas, etc.)
2. Laptop for practicing creative communication skills

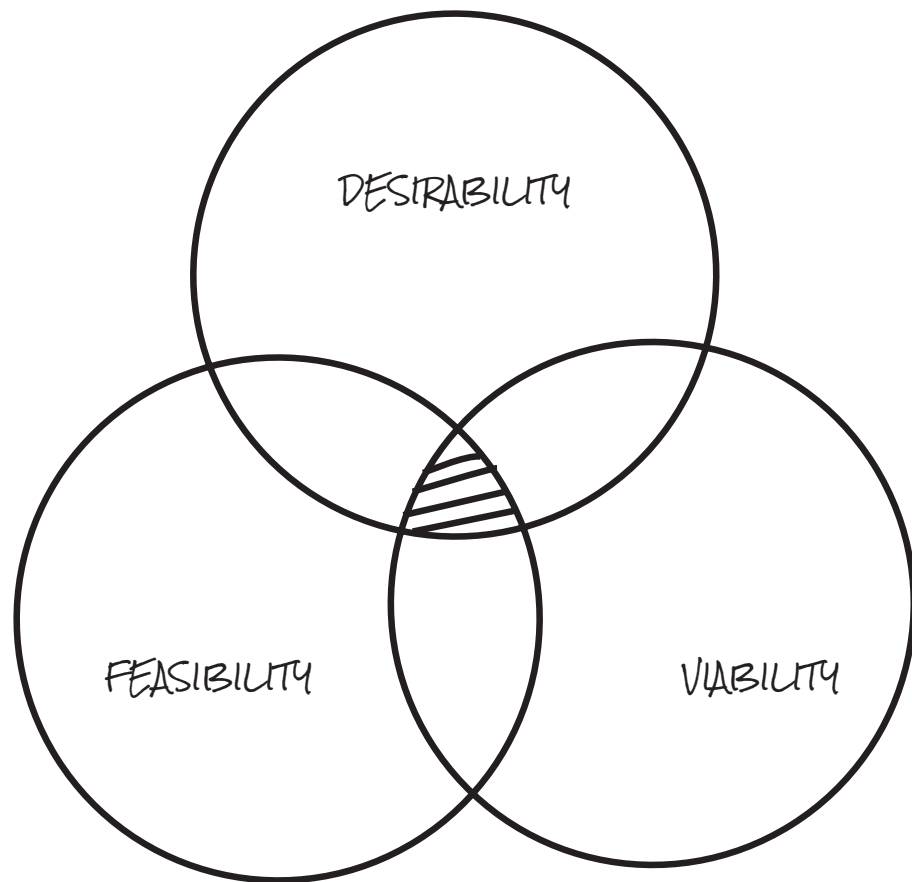
What you'll take away:

1. Strategies and tools for creating compelling project communications



THE PROJECT MANAGER

**IS THE ONE MAINTAINING
THE BALANCE OF NEEDS
BETWEEN THE THREE
"COMPETING ARMS"
—DESIRABILITY,
FEASIBILITY AND
VIABILITY OR
PEOPLE, TECHNICAL
AND MONEY.** [Tim Leisio]



DESIRABILITY: Do I have a "real world" problem to solve or a need to fill?

FEASIBILITY: Do I have the physical resources available to ensure this project takes off? If not, can I get them?

VIABILITY: Is the solution sustainable (cost-wise and over time)?

WORKSHEETS



YOUR PERSONAL WORKBOOK

The following worksheets are provided to help you complete the activities included in this course. Please note that you're free to improvise with any of the exercises...and they won't be marked! (Or even silently judged, haha.)

And if you do copy any of these pages to use with your own work teams (we hope you do!), just give us a shout-out!

PROJECT PLAN

DESIRABILITY

POINT OF VIEW STATEMENT

(Tell Your Story, POV Statement)

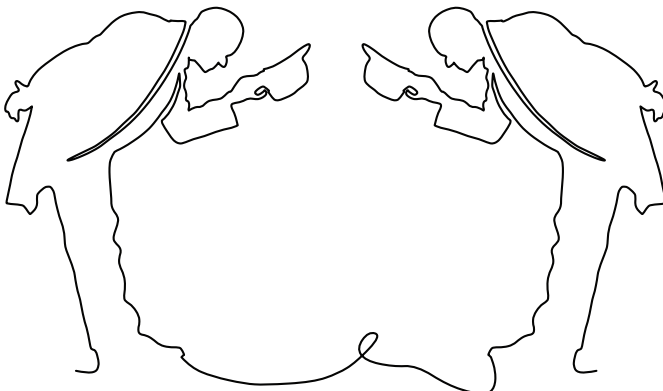


IMPACT

(Ripple Effect Mapping)

BENEFICIARIES

Who is involved/impacted? *(Ripple Effect Mapping)*

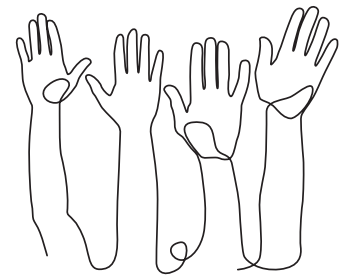


ENGAGEMENT PLAN

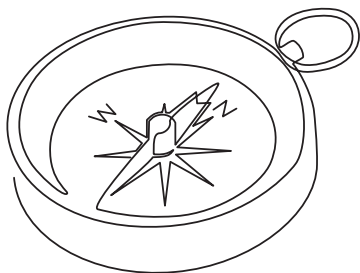
Communicate effectively with your beneficiaries.

TEAM MEMBERS

These are the people directly involved in making things happen. List names and roles/skills. *(Team Skills)*



FEASIBILITY

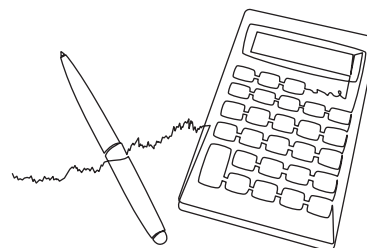


GOALS & GAPS

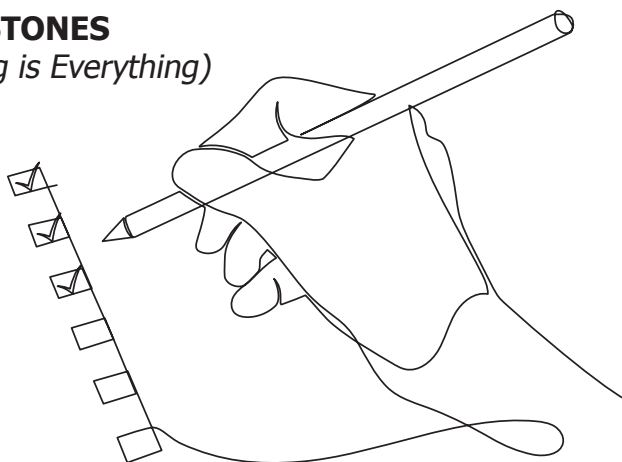
Define the project goals and identify gaps in team knowledge and expertise required.
(Project Compass, Gaps and Rings)

VIABILITY

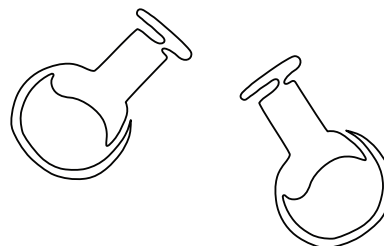
BUDGET *(The Bottom Line)*

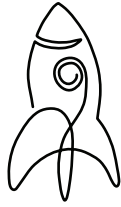


MILESTONES *(Timing is Everything)*



RISKS *(Risky Business, Test Your Assumptions)*

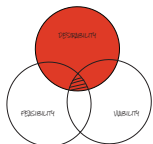




WHAT'S THE STORY BEHIND YOUR PROJECT?

Take some time to flesh out the background for your project (e.g. get started on that project brief) by answering the following questions. The length of this activity depends on the scope of the project and how much research you already have at your fingertips.

- What "real world" problem(s) or need motivates this project?
- What assumptions do you have about the problem and who it impacts?
- What existing data will you use to confirm your point of view? (e.g. have similar projects been done in the past and can you learn from them? Has data already been collected about this issue and the group(s) it impacts)
- What other perspectives should you consider?





POINT OF VIEW (POV) STATEMENT

Creating a point of view statement will set the tone for your project and guide all the goals that you set. Getting it right is of the utmost importance—no pressure or anything!

POINT OF VIEW TEMPLATE

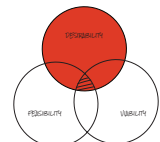
BENEFICIARY GROUP	PROBLEM(S)/NEED(S)	IMPACT(S)
E.g. Students	E.g. Flexible learning options	E.g. Inability to work part-time without flexible options

POINT OF VIEW STATEMENT

Here's how to write it out:

_____ (*USER*) needs _____ (*USER'S NEED*) because
_____ (*IMPACT*).

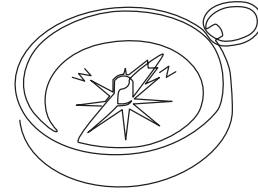
Now write your statement:



PROJECT BRIEF

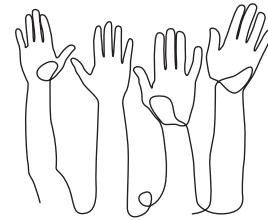
PROJECT OVERVIEW

Briefly summarize the project (2–3 sentences)



PROBLEMS/NEEDS

List the "real-world" problems the project will address



BENEFICIARY GROUP(S)

List the individuals/groups the project will impact

POINT-OF-VIEW

Write your point-of-view statement



IMPACTS

List the impacts your project will have on the beneficiary group(s)

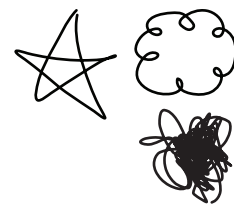


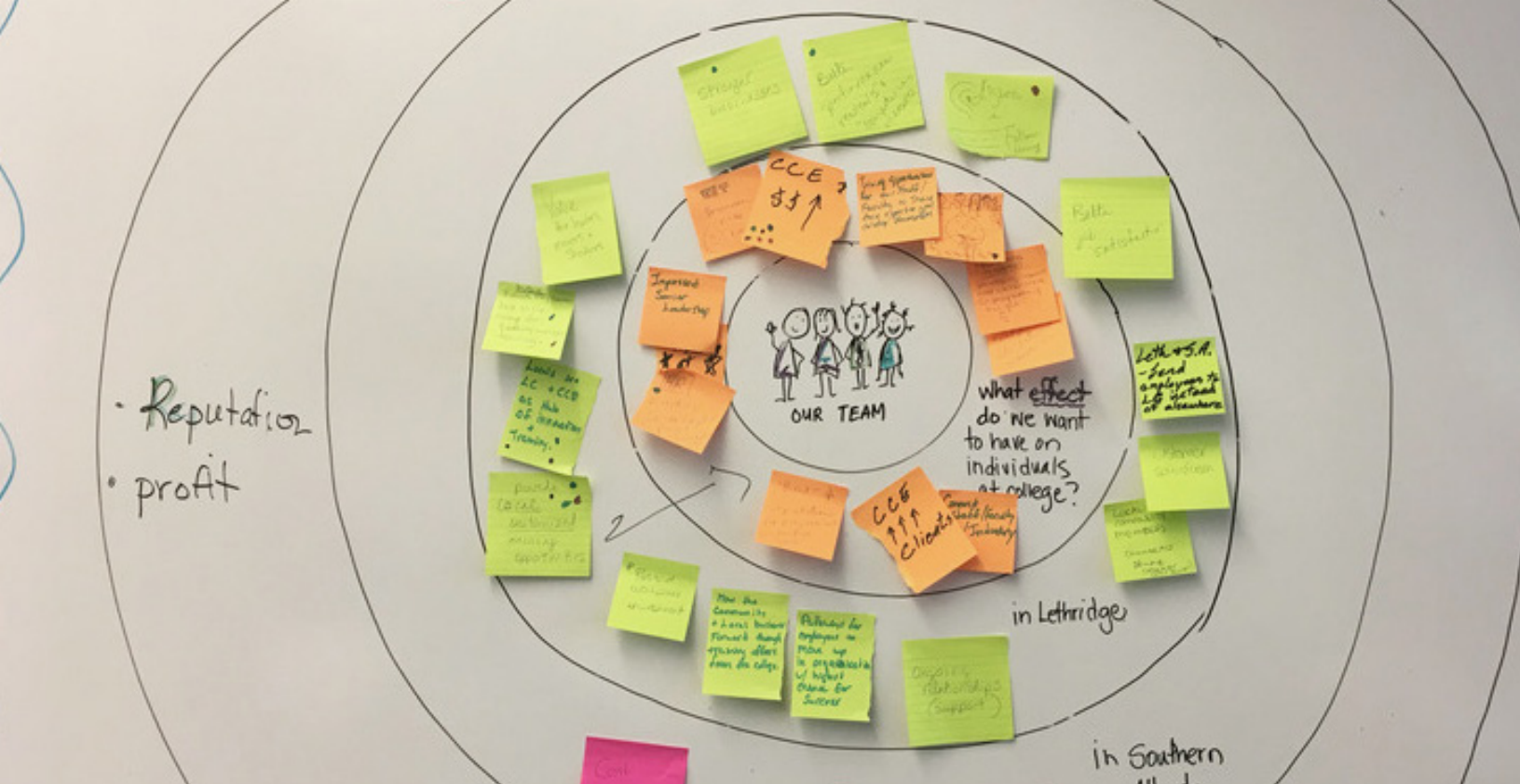
PROJECT GOALS

List the project goals you identified based on the impacts (goals typically minimize negative impacts or solve problems)



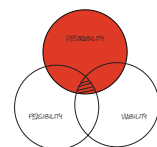
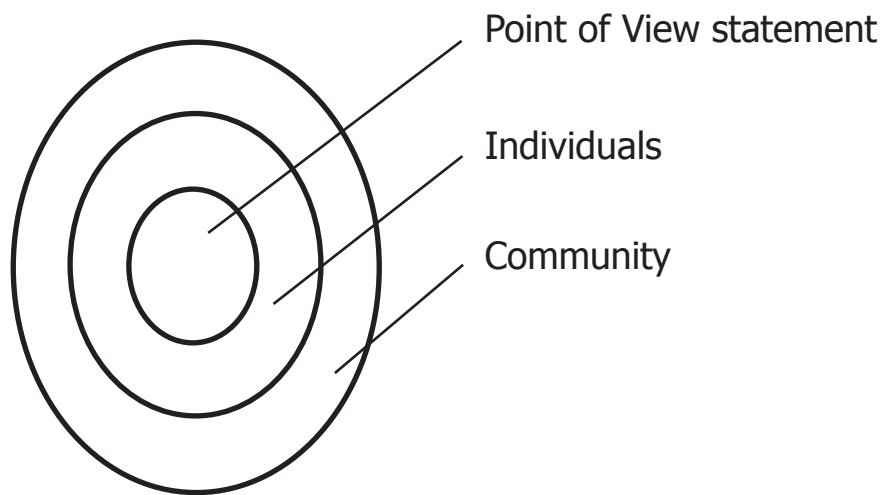
NOTES





RIPPLE EFFECT

Map the potential beneficiaries and **impact(s)** of your project.



Source: Collective Action Toolkit

1

Identify the Problem

Draw a circle in the middle of a large piece of paper or whiteboard, and write the problem, which you identified in your point of view statement, in the middle.

2

Individual Impact

Then, draw another, larger circle around the first and label it "Individuals". Reflect on how solving the problem would affect individuals closest to the problem (e.g. family, coworkers, students), and write this effect in the first ripple.

3

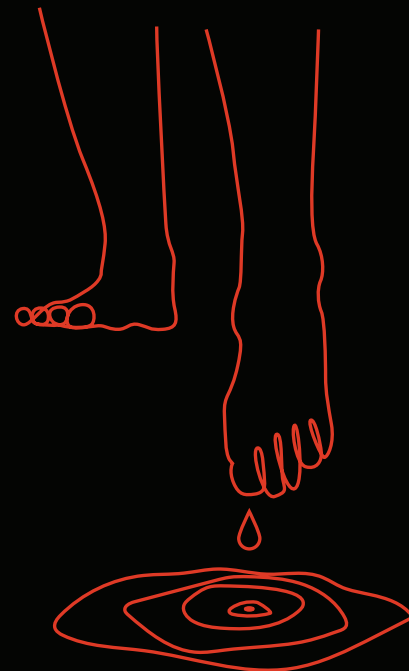
Community Impact

Draw another, larger circle and label it "Community". Reflect on how the problem would affect the community, and write this effect down in the circle. Continue to draw circles and write effects for groups that might be impacted (e.g. city, province, nation).

4

Decide and Document

Once every team member has created a ripple map, return together and compare them. Note similarities and differences. Choose the circle (individual, community, city...) the team wants to focus on. Document your choices.





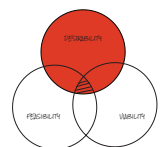
CREATING CONVERSATION

Confirm the **desirability** of the project by interviewing beneficiaries to gain their perspective on "the problem space" and how they are impacted.

Example:

"How do you experience _____ *(problem/need)* _____?"

"What do you wish was different? Why?"



Source: The Art of Opportunity

1

Create a Documentation Space

Decide how you will collect answers and create a space or document to do so. Will you write their responses on stickies, use a piece of paper, or video record?

2

Start with the Basics

Ask for their name, role, and interests (related to the project).

3

Experience Questions

Move to questions that help you understand their experience of the "problem space"? (e.g. How do they experience the problem or need that prompted your project?) Ask for specific concrete examples of how they are impacted.

4

Feelings and Motivation Questions

Finish with questions that get to the heart of their feelings and motivations (e.g. What do you feel are the underlying reasons for this problem or need? What are your gripes? What do you wish was different? Why do you wish this was different?).



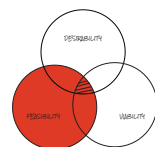


TEAM SKILLS

Share team skills and find skill gaps.

Example:

MARY SMITH	
Project Skills	Accomplishments
<ul style="list-style-type: none">• Organization• Project Management• Networking	<ul style="list-style-type: none">• Successfully piloted a social networking platform



Source: Collective Action Toolkit

1 **Document Individual Skills**

On a sheet of paper, have individual team members write down at least three skills and one accomplishment that relate to the project problem.

2 **Visually Express Yourself**

On the flip side of that paper, have individual team members create something visual that expresses who they are.

3 **Share, Discuss and Document**

Note any skills that are missing but may be needed to solve the project problem. Keep this document somewhere that is easily referenced.





PROJECT COMPASS

Select and prioritize project **goals**.

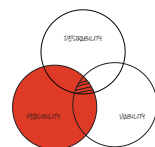
Example:

IMPACT:

Students and staff don't gather in the space because it lacks aesthetic appeal.

GOAL:

Create a multi-use, inviting space to accommodate casual meet-ups.



Source: Collective Action Toolkit

1

Prioritize Impacts

List the impacts defined in the ripple effect mapping. Have each member vote on their first choice (for long lists/large groups, you can also vote on second and third choices). Do this visually by starring them directly on the paper.

2

Revise or Remove

Consider those that received no votes. Do they need to be revised or crossed out? Review the ones that received votes. Now that you've had time to ponder them, do they need any changes?

3

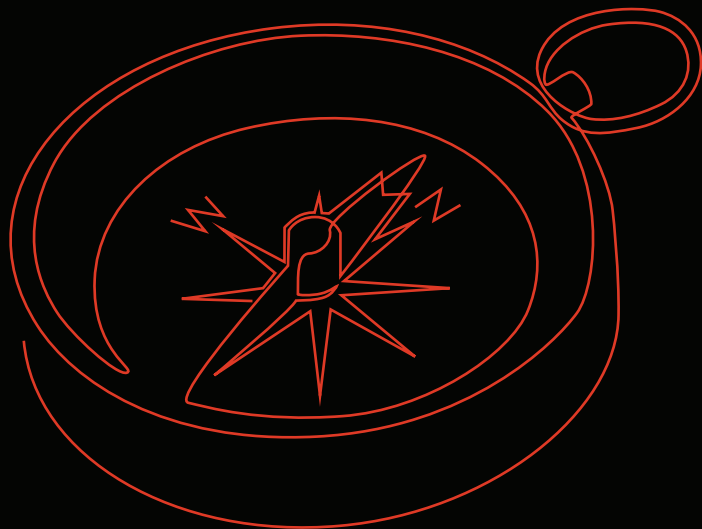
Develop Goals

Reframe a negative impact as a positive goal to achieve (e.g. Impact: students and staff don't gather in the space because it lacks aesthetic appeal. Goal: create a multi-use, inviting space to accommodate casual meet-ups).

4

Prioritize Your Goals

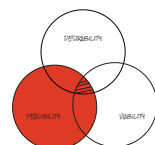
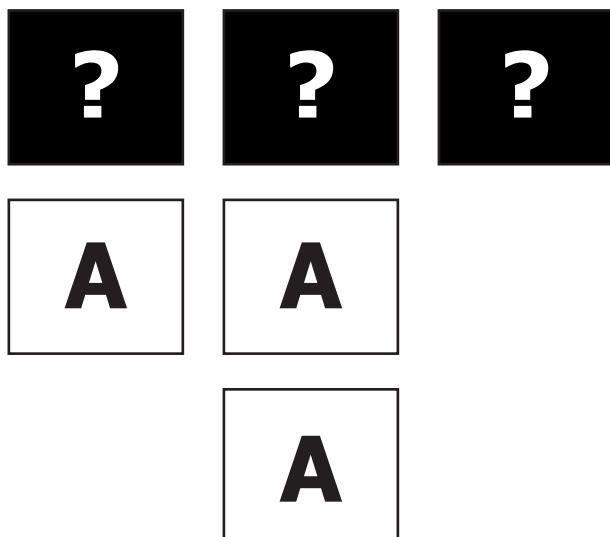
Use a clean sheet of paper to rewrite your goals in order of priority (most stars). This will be the basis for setting timelines later on.





GAPS AND RINGERS

Find out what the **team** already knows about the project and identify knowledge **gaps**.



1

Ask Questions

Have team members write any questions they have about the project on a sticky (one question per sticky).

2

Organize the Questions

Place the question stickies on a whiteboard or table, somewhere everyone can see them.

3

Answer the Questions

Use another coloured sticky or write directly on the whiteboard underneath the question.

4

Share and Prioritize

Review the questions and answers. Identify the unanswered questions, and move the stickies so they show order of priority or number the stickies by order of priority.

5

Identify Project "Ringers"

Recruit people with knowledge and expertise to fill the gaps.





ENGAGEMENT PLAN BLUEPRINT

Plan your engagement with team members and stakeholders to ensure you communicate effectively.

STAKEHOLDERS & POTENTIAL ISSUES

STAKEHOLDER GROUP	POTENTIAL LEVEL OF IMPACT ON STAKEHOLDERS (LOW / MED / HIGH)	STAKEHOLDER ISSUES / CONCERNS	POTENTIAL LEVEL OF CONCERN FROM STAKEHOLDERS (LOW / MED / HIGH)	NOTES
e.g. Faculty	e.g. High level	e.g. Impact on workload	e.g. High level	

DECISIONMAKERS

INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
	<ul style="list-style-type: none"> Advisory Members Students Graduates Employers 	<ul style="list-style-type: none"> Institutional Planning Registrar's Office 	<ul style="list-style-type: none"> Learning Experience Designer Steering Committee 	<ul style="list-style-type: none"> Dean Chair

ENGAGEMENT OPPORTUNITIES

WHY? ENGAGEMENT OBJECTIVE	WHAT? FACILITATION OR COMMUNICATION STRATEGY	WHO? STAKEHOLDERS OR AUDIENCE	HOW? FACILITATORS & RESOURCE NOTES	WHERE? DATE, PLACE, TIMES
e.g. Ask for input drafting a new policy	e.g. Focus Group	e.g. Faculty, Faculty Association, Registrar's Office	e.g. Karen will facilitate; need flip chart, pens, projector	e.g. March 24, 2018 in TE3218

COMMUNICATION STRATEGY

What communication modes are being used?

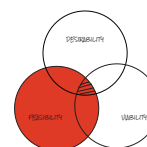
☐ Email ☐ Phone ☐ Meetings ☐ Other _____

How frequently will we communicate?

☐ Weekly ☐ Bi-Weekly ☐ Monthly

WORKING CONSTRAINTS

What do we need to consider when we work together? e.g. Joe can only come to meetings M/W/F...



1

Learn

- Describe the project
- Identify decisions to be made (scope, decision makers)
- Brainstorm stakeholders and possible issues
- Describe engagement goals

2

Listen

- Comprehensive list of stakeholders
- Correlate stakeholders and identify issues
- Refine scope
- Assess stakeholder expectation of engagement
- Select levels of engagement

3

Identify

- Outline critical input points
- Define engagement objectives
- Decide how input will be gathered

4

Plan

- Identify facilitation and communication techniques
- Identify roles, responsibilities and support elements for implementation

5 STEPS TO GOOD ENGAGEMENT PLANNING

5

Reflect

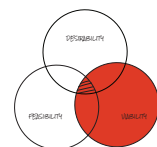
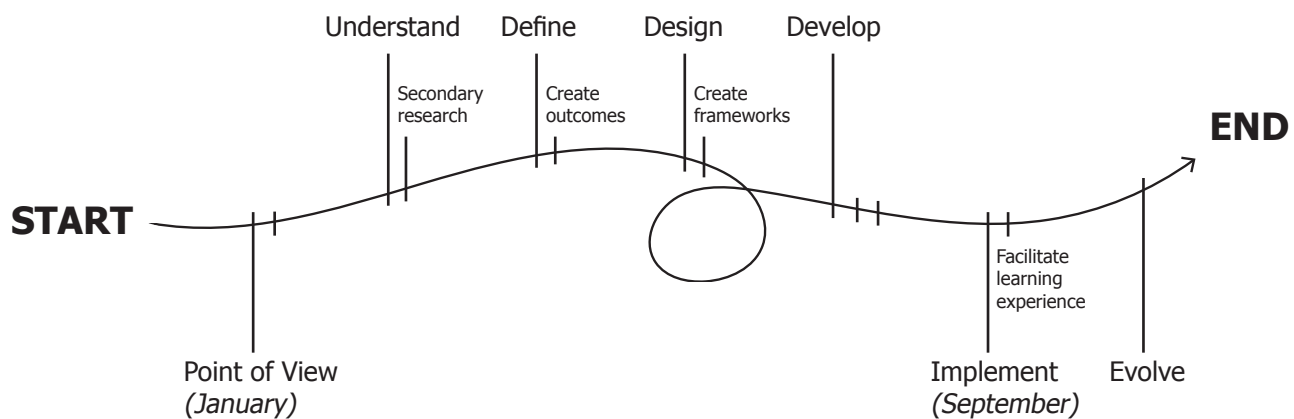
- Plan for evaluation at each step
- Document lessons learned

Want to get started? Head to Canvas for an editable engagement plan file.



TIMING IS EVERYTHING

Work backwards from your end date to set realistic **milestones**.



Sources: Design Thinking for Educators and Collective Action Toolkit

1

Start with the End

Decide as a team the end date for the project. But remember, it's not just about the team—what are the needs of the people you are doing the project for? What are their challenges? Timelines? End game? Do you have a day? A week? A month? A year?

2

Sketch Your Timeline

As a group, use a large whiteboard or paper to draft your timeline by working backwards from the end date. You might just draw a line, or you might visualize it better by sketching a calendar. First, outline the major milestones (e.g. create prototype). Then, return and add deadlines (yours and externals), meetings, and check-ins.

3

Brainstorm Task Lists

What do you need to get the project started? Are there certain tasks you already know you must do later? Split into small groups and have each group brainstorm the tasks and due dates for each milestone.

4

Consolidate and Adjust

Return together and share tasks. Are there any that overlap or conflict? Adjust dates and tasks as required.



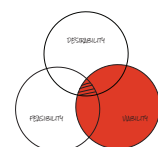


THE BOTTOM LINE

Determine the **return on investment** for your project. Nothing fancy here, it's just a good ol' fashioned budget table. Some things never change. Estimate your tangible and intangible costs (money spent) and benefits (money returned) to ensure the project is viable.

Example: Running a workshop (simplified)

COSTS		BENEFITS	
FACILITATION	\$1000	PARTICIPANT FEES (\$500 X 10 PARTICIPANTS)	\$5000
PRINTING & MARKETING	\$1500		
SUBTOTAL	\$2500		
ADMINISTRATION FEES (15%)	\$125		
TOTAL COSTS	\$2625	TOTAL BENEFITS	\$5000
		TOTAL COSTS	\$2625
		DIFFERENCE	+\$2475



1

List Your Possible Costs

Consider both direct (things that can be completely attributed to something tangible, such as printing, facilitation fees, food) and indirect costs (things that are necessary, but can't be attributed to something tangible, such as administrative work and utilities).

2

List Your Possible Benefits

Will you charge a fee, get a sponsorship/grant, or is it part of your department budget? Outline all the places you will get budget for the project and the expected dollar amounts.

3

Split the Difference

Calculate the difference between benefits and costs. If you break even or are have a positive difference, your project is probably viable.

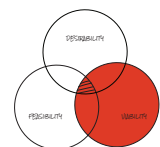
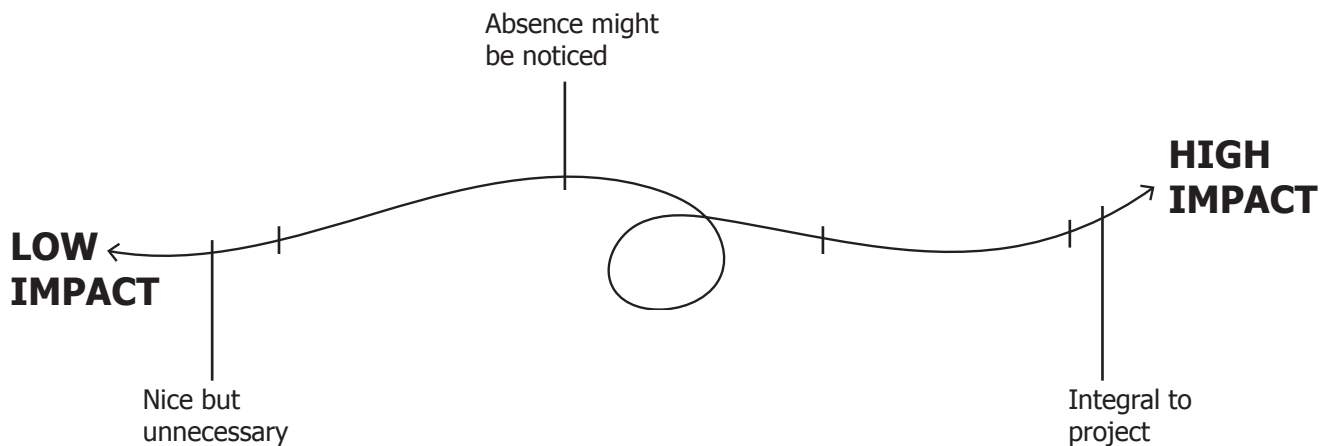


Want to get started? Head to [Canvas](#) for an editable Excel spreadsheet.



RISKY BUSINESS

Identify **potential risks** and pivots using creative thinking.



Source: Design a Better Business

1

Review Your Project Brief

At the outset of your project, you should have made a list of assumptions (What's the Story Behind your Project?). Start with these, and reflect on any others you may have missed.

2

Write it Down

Write each assumption on its own sticky note.

3

Prioritize by Impact

Draw a line scale from low impact to high impact. Of all the assumptions listed, which ones must absolutely be true for your project to work? Put these on the high impact side. Place those with mid to low impact on the scale.

4

Cluster

Are there any impacts that depend on each other? Move these sticky notes together so they touch.

5

Vote

You should have only a few high impact assumptions. Vote with your team on the most fundamental one.

6

Test Your Assumptions

Experiment with your assumption to decide if you are on the right track or if you should pivot (next activity provides instructions).

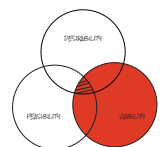


TEST YOUR ASSUMPTIONS

Test your fundamental assumption to **decide** if you should move forward or pivot.

Example:

We believe _____ *(specific testable action)* _____ will lead to
_____ *(specific measurable outcome)* _____.



Source: Design a Better Business

1 Write a Hypothesis for Your Assumptions

Write a statement about what you think is true about your assumption.

2 Summarize Your Brief

Summarize your project brief to share with beneficiaries. If possible, make it visual. It can be a simple napkin sketch, a complex model or role-play, or a brief presentation.

3 Test

Gather a group of representatives to provide feedback on your brief. You might use the Creating Conversations tool described earlier in the workbook.

4 Persevere

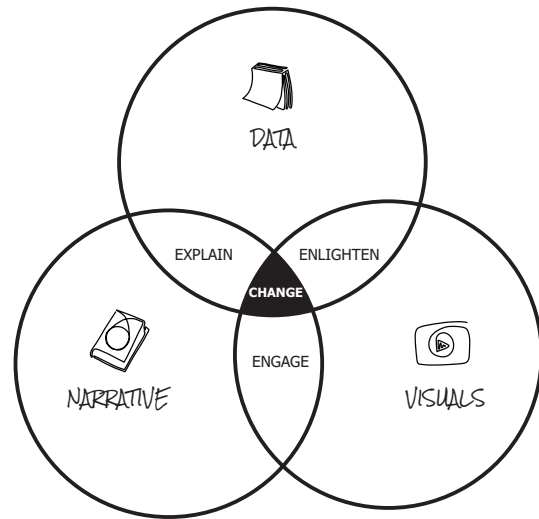
Does the feedback you gathered support your being on the right track? If not, head back to your point of view statement to see if you can find a different solution to the "real-world" problem. (Yes, you'd be starting over again, but isn't that better than persevering with the wrong—undesirable, unviable or unfeasible—solution?)





LET'S DOCUMENT THAT

Communication should happen multiple times throughout a project, and you decided earlier in your engagement framework the ideal times and methods. There are times when quick communication, such as an email, is necessary and essential; however, other times, you need to engage your beneficiaries and maybe even gather buy-in. For example, when you share your project brief and potential solution for the first time, a mid-project update, or a final communication upon project completion. The best way to engage your audience is to tell a story rather than listing the things you did. The following tips can help you do this.



Narrative

Telling stories can humanize the project by building empathy and excitement in the audience.

- If possible, frame the story around a person, even if it is a made-up person—aren't people at the heart of human-centred design? Tell their story to emphasize how you considered beneficiary needs. Keep it simple, and use only one protagonist.
- Share the challenge of the project within the context of the story. Stories that provide a clear example of the challenge and how it impacts the protagonist will help your audience understand the value of your idea.
- Keep it short. Give enough detail to communicate the basics but not so many they get lost in the intricacies.

Data

There's nothing like data to confirm the desirability, feasibility, and viability of your project, right? Include this data in the story. What did you learn in your interviews, and what insights did it create? What budget estimates did you make, and how will they impact the project? What steps did your team take to ensure they could complete the work? Choose the data that best suits the specific communication. Don't just show; prove how the steps you've taken help you move to the project goal.

Visual

People connect to and remember visuals better than just hearing something or reading an email. Choosing the right visual will increase the impact. Will you do a mock-up? Maybe make a presentation or video? If it must be a report, how can you make it as visual as possible?

Sources: Visual Thinking, Business Model Generation, The Art of Opportunity

FROM BLAH TO BLAM

(5 TIPS FOR GOOD DESIGN)

1. Use Words on Purpose (Curate the Information)

2. Keep it Simple & Consistent (More is Usually NOT More)

3. Pictures Speak Louder Than Words (Or At Least As Loud)

4. Respect Dimensions (SHIFT + Click & Drag)

5. Make Use of Resources (There are LOTS, and Many are FREE)



REFERENCES & RESOURCES

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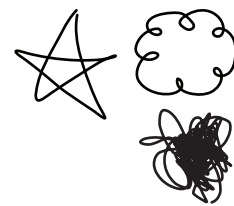
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