

Developing a Workplan

Your workplan should capture how you intended to achieve your project goals over a defined period of time. It provides structure to the team by outlining your scope of work, planned milestones, and expected use of funds.

Think about your workplan as a proposal – it's a starting point and a plan for the next phase of your project. It's common for your goals, milestones, and the activities that support them to evolve as progress is made.

Use your workplan to keep the team on track and in sync as you work together toward your goals. It's also a great tool for communicating progress to those who are assisting you (e.g., project mentors).

Recommended Sections for Your Workplan Document

- The team**
 Who is part of the project? Keeping contact information as part of the workplan is useful when communicating with advisors outside of your group. Capture all team members, faculty sponsors, mentors, and partners.
- Scope of work**
 Create a summary of the project and your key goals (keep it brief, 100-200 words).
- Milestones**
 Milestones and the timelines associated with them are the heart of the workplan. It's often helpful to begin with a bullet point list of planned team accomplishments (and anticipated completion dates) that mark a significant step in the progression of the project.

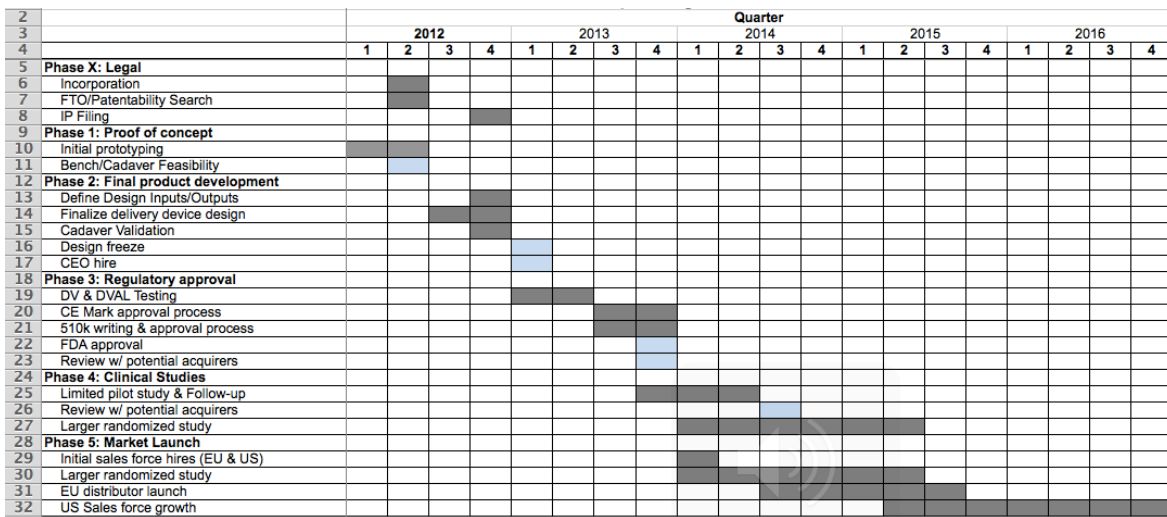
Examples of milestones:

- | | |
|---|----------|
| • Complete a literature review on XYZ | MM.DD.YY |
| • Recruit an advisors with XYZ expertise | MM.DD.YY |
| • Interview X doctors to revalidate our need | MM.DD.YY |
| • Survey X patients via online form to gather input on our solution | MM.DD.YY |
| • Finalize our detailed product specifications | MM.DD.YY |
| • Submit XYZ draft application | MM.DD.YY |
| • Prepare a first draft of paper for XYZ journal | MM.DD.YY |
| • Develop a complete works-like prototype | MM.DD.YY |

The next step is breakdown each milestone into a set of key activities that must be completed to accomplish it. Each activity should have its own target due date.

Then, document these milestones and activities in the form of a project development timeline. You can use a Gantt chart, Excel sheet, or Google document to do this. See Figure 1 as an example.

Figure 1 – A High Level Gantt Chart



Source: Courtesy of Ciel Medical.

Choosing the level of detail and timeline for your workplan is up to the team. This example is a very high-level plan that documents critical milestones on the path to patient care. In the early stages of your project after class, it probably makes more sense to focus on a shorter timeframe and more tactical milestones. For instance, many teams develop a preliminary workplan for 1-2 quarters or for the upcoming academic year. And their milestones are focused on the most important near-term risks that must be retired to make sure the project is worth continuing.

Once your plan is drafted, assign one team member to be the “lead” for each milestone so that there’s a clear owner for each workstream and everyone is engaged.

- **Budget**

Think about how much funding you will need to accomplish your milestones and capture this in the form of a budget. With the funding you have, track expenditures as they occur. A spreadsheet of amounts and dates typically works well. Nothing fancy is needed in the early stages of your project – just diligence. As you make progress, keep an eye out for where and when you might find more funding opportunities.

Example budget format:

Expense Category	Description	Date of Expense	Amount of Expense	Notes