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## FOR MARKETING PROJECTS



***“By failing to prepare, you are preparing to fail.”***

- Benjamin Franklin

**I get it. You want to get your project moving.** Actually, you wanted it done already, but in the whirlwind of other responsibilities you have not been able to leave the start line. I’ve learned an invaluable lesson over the last 20 years of bringing marketing projects to the finish line, best expressed in the words of Dwight D. Eisenhower:

*“In preparing for battle I have always found that plans are useless, but planning is indispensable.”*

**Planning is indispensable.** But it can also feel overwhelming, time consuming and, depending on your personality, like a waste of time. That is why I created the *1-Page Project Planner for Marketing Projects*. I want to help you plan your project more efficiently because I know planning will help you:

Bring **clarity** to your desired outcome and create materials that **drive sales** results

Build the **best team** to cross the finish line successfully

Think through the **major mile markers** of your project

Work out your **budget** so there are no surprises

Share your project plan with your manager with **confidence**

Provide your project team with an overview so all players are **collaborating** toward the same finish line

**Reduce anxiety** by helping you **prioritize the tasks** of your project

My hope is that this free tool will help you set a foundation for project success. Use it, adjust it to fit your needs and tell us your stories of finish line triumph!

**Here’s to progress!**



Stephanie Haenchen  
Chief Pacesetter, Pace Marketing

# 1-PAGE PROJECT PLANNER

## FOR MARKETING PROJECTS

1 / PROJECT NAME		2 / DEADLINE	
3 / PROJECT PURPOSE		4 / DESIRED RESULTS	
5 / STAKEHOLDERS and ROLES			
ROLE		NAME	
Project Lead			
6 / TIMELINE			
MILE MARKER		DUE DATE	OWNER
7 / BUDGET			
EXPENSE			\$ AMOUNT
			TOTAL
8 / DELIVERABLES			
END PRODUCT (Include quantity if applicable)		DELIVERY/DEPLOY DATE	

# ▶▶▶▶▶ HOW TO USE THIS PROJECT PLANNER

## 1 / Project Name

Choose a name for your project that is simple yet descriptive so team members and outside reviewers can easily understand what you are working on. For example, the project name "Brochure" would not be descriptive enough to offer clarity. A better option would be a more specific name including what is featured in the brochure, such as the product name.

## 2 / Deadline

What is the FINAL deadline for the project? Be sure to include any post-deployment activities. For example, a website may go live on May 15th but you will still need to do live testing, verify analytics are set up and review the results of the project with the team. Your deadline date should be the date of the last activity related to the project.

## 3 / Project Purpose

Why is this project necessary to advance your product line, division or the company as a whole? What will it communicate and to which target market or persona?

## 4 / Desired Results

What impact should this project have on the business? You should include a measurable outcome such as the number of leads or amount of sales you hope to generate as a result of this project.

## 5 / Stakeholders & Roles

Name each person that will be involved with this project and their role. For larger projects you may want to only include the leads for each component of the project. If, for example, you have several content writers, you might include one point-person for all content. That person could create a separate planner to outline the more granular details of content generation.

## 6 / Timeline

This section should include the mile markers of your project. You can do this at a higher-level or get very detailed. Higher-level mile markers for a brochure might include Content, Design, Final Approval and Print Delivery. A more detailed approach might also include versions of the project and revisions for each version.

## 7 / Budget

List any expenses or hours you would like to capture related to the project and the estimated cost. This could include, but is not limited to, 3rd party vendor fees, agency fees, printing costs, KOL honorariums, licenses for marketing systems, and time used by internal team members.

## 8 / Deliverables

Use this section to list any finished products related to the project and their deploy dates. For example, with a direct mail brochure you may include the deadline for the mail drop as well as the deadline for when extra brochures are delivered to your office or literature warehouse. For a website you may include the go live date, the date you plan to announce the site launch and delivery date for the first analytics report. For automation campaigns you can use this section to map out triggers and delays for each message.

# 1-PAGE PROJECT PLANNER SAMPLE

## FOR MARKETING PROJECTS

1 / PROJECT NAME		2 / DEADLINE	
Product A Sales Aid		End of Q3 or September 27, 2019	
3 / PROJECT PURPOSE		4 / DESIRED RESULTS	
Provide a sales aid that highlights the key benefits of product A and supports the sales representative in the sales process. Will act as a leave behind for sales calls and literature at tradeshow.		Increase number of opportunities that move from the prospecting to qualification stage in the sales cycle.	
5 / STAKEHOLDERS and ROLES			
ROLE		NAME	
Project Lead		Jane Smith, Marketing Coordinator	
Product expert		Marco Knowsalot, Product Manager	
Content		Medical Writer @ Pace Marketing	
Graphic Design		Designer @ Pace Marketing	
6 / TIMELINE			
MILE MARKER		DUE DATE	OWNER
Finalize Content		July 22, 2019	Pace Marketing / Jane Smith
Version 1 Design		August 6, 2019	Pace Marketing
PRC Approval		September 10, 2019	Jane Smith / Pace Marketing
Final print and delivery		September 24, 2019	Pace Marketing
7 / BUDGET			
EXPENSE		\$ AMOUNT	
Content & Design		\$6,450.00	
Printing		\$7,575.00	
		TOTAL \$14,025.00	
8 / DELIVERABLES			
END PRODUCT (Include quantity if applicable)		DELIVERY/DEPLOY DATE	
Multi-page sales aid [5,000]		September 24, 2019	
Field sales announcement		September 26, 2019	



## Dos and Don'ts



- Do use this tool for projects with a team of 1 or 100
- Do evaluate your project plan with your team or manager and revise as needed
- Do use current analytics to set your desired results – set an impressive but not impossible goal for each project
- Do provide a high-level view of the budget at the beginning of your project
- Do think about dependencies – it is critical to know what mile markers are dependent on the completion of other tasks
- Do utilize multiple planners for larger projects - 1 for the high-level details of the project with planners for each sub-project or team contributing to the whole
- Do load your plan into your task management system for easy team collaboration [and less email... because who doesn't love less email!]
- Do reuse previous project planners – the foundation of similar projects is likely to be the same, so make your life easier and start with an existing framework



- Don't plan your project without clarity on the purpose and desired outcome
- Don't get lost in the minute details of each stage – you will tackle those details as you progress through the project
- Don't be unrealistic about how quickly you can reach each mile marker - plan for the worst and execute at your best
- Don't create your plan in isolation – even if you work alone, get feedback from a trusted source to identify blind spots
- Don't create a plan and then push it aside – revisit your plan regularly throughout the project and revise as needed