

Workplan Job Aid

What is a workplan?

A workplan serves as the roadmap for a project. It is completed by the team lead during the plan phase, with input from the team. During later phases it is updated to reflect any changes in timeframe or tasks. A workplan defines the schedule, assigns tasks, and confirms steps are completed as planned.

A project manager and/or team lead uses the workplan to monitor the work effort and to identify issues to be communicated to sponsors, stakeholders, and/or team members.

Things to remember to maintain a workplan:

- Share and actively use the project workplan
- Communicate the workplan with all team members frequently to confirm each individual is on schedule and understands the scope of assigned tasks
- Adjust future deadlines or project scope if earlier work is taking longer
- Investigate reasons for missed deadlines
- Consider risk and mitigation strategies

How to complete a workplan:

Using the workplan template, consider the following questions:

1. Review major tasks from each phase to develop and deliver the training course.
2. Determine appropriate team members to be responsible for each task.
3. Assign deadlines for task completion. If applicable, identify draft and/or review dates.
4. Consider all affected by the training project who should be involved in reviews and sign-offs, such as:
 - Sponsors
 - Team members
 - Stakeholders
5. Schedule next gathering/conference calls.
6. Ask another project manager and/or team lead to review the workplan to confirm all necessary tasks have been captured and the deadlines are realistic.