

Project Milestones Template

An outline of project milestones for your employee handbook update project.

Project Foundations

Kind of like getting a building permit... these are the nitty-gritty details to knock out before you can start the project for real.

	Item	Date	Who's Responsible?
<input type="checkbox"/>	Obtain leadership approval to undertake project		e.g. HR
<input type="checkbox"/>	Vendor & contract approval from IT & Legal		
<input type="checkbox"/>	Paperwork is complete (e.g. W9s, vendor setup, initial payments, etc.)		
<input type="checkbox"/>	Ask your software vendor (if you're using one) about vendor-specific tasks		

Content Creation, Editing, Review, and Approval

The most variable and likely the lengthiest part of your project. Timing depends on your team's motivation, current workload, the amount of changes you're making, etc.

	Item	Date	Who's Responsible?
<input type="checkbox"/>	Create new or edited content		
<input type="checkbox"/>	Request feedback from your HR team and make changes		
<input type="checkbox"/>	Request a review by legal counsel and make changes		
<input type="checkbox"/>	Request feedback from leadership and make changes		
<input type="checkbox"/>	Repeat previous 3 steps as necessary...		
<input type="checkbox"/>	Content approved!		

Distribution Prep

You will likely need to involve your IT department at this stage. These tasks can take 2 days or 2 months, depending on how you've decided to distribute your policies and the competency & workload of your IT department. Pro-tip: Do these tasks concurrently with the above content tasks as they're mutually exclusive.

	Item	Date	Who's Responsible?
<input type="checkbox"/>	<p>The audience for your new policies has been determined and the tasks to ensure that audience can successfully access the policies after launch have been completed.</p> <p>Using software?</p> <ul style="list-style-type: none"><input type="checkbox"/> Upload/sync your employee list<input type="checkbox"/> Set up Single Sign-On<input type="checkbox"/> Set up custom domains		
<input type="checkbox"/>	Check and make sure your launch email will be delivered successfully (won't be caught by spam, etc.) and, if using software, adjust any necessary settings		

Content & Design Implementation

You may need to involve your marketing team, although that varies greatly by project.

Item	Date	Who's Responsible?
<input type="checkbox"/> Send content & branding guidelines to vendor or 3rd party, if you're using one		
<input type="checkbox"/> Review resulting design with marketing team		
<input type="checkbox"/> Circulate final design within HR for feedback		
<input type="checkbox"/> Send final design to leadership for feedback		
<input type="checkbox"/> Repeat previous 3 steps as necessary...		
<input type="checkbox"/> Your policies are designed and ready to launch!		

Launch

The big day! Pick a day and time when your audience will pay attention.

Your Handbook Launch Day

Item	Date	Who's Responsible?
<input type="checkbox"/> First signature reminder is sent (e.g. a week before it's due)		
<input type="checkbox"/> Second signature reminder is sent (e.g. on the due date)		
<input type="checkbox"/> Third signature reminder is sent (e.g. a couple days after the due date)		

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