

Skillbook

Planning Small Projects

Project-Management
Skills



Mindtools

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Skillbook

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1. Introduction

At some point, you've likely managed a small project – whether you realized it or not! Perhaps you put together a design proposal for a new product or service, changed a business process, or reorganized information storage for your company.

Most people have a healthy respect for large or “flagship” projects, and for the planning that's required to make them a success. But we often overlook the importance of small projects, which can be just as critical to the smooth running of your organization. The scale may be different, and the process less complex, but the key principles of planning are the same.

It can be tempting to skip the planning phase of small projects, particularly when you're already familiar with the work involved. But this can be a big mistake. If you don't plan your small project thoroughly, you might overlook critical steps, miss deadlines, or make costly errors.

In this Skillbook we explore a set of simple planning tools that you can use to deliver small projects effectively.

You'll learn how to:

- Use an Action Plan to identify essential tasks.
- Create a Work Breakdown Structure to break actions down into manageable chunks.
- Draft a simple Gantt Chart to schedule events and create a project timeline.

2. Action Planning

There are a number of formal techniques, such as PRINCE 2® and PMBOK®, that you can use to plan large projects. These are designed to help you keep everything organized and running smoothly.

With small projects, however, most of the information is in your head. You just need to come up with an easy and efficient way to organize it.

For small projects, you may not have the time or resources to create a project charter or to analyze your critical path, and it's usually not necessary. Instead, you can just devise a clear and concise plan that defines what has to be done, who has to do it, and when each task should be completed.

Using an action plan can be the fastest and most efficient way to do this. Here, you create a simple list of the tasks you have to complete to reach your project goal.



Action:

Think of a small project that you're working on, or one that you'll be starting soon. Brainstorm a list of everything that you need to do to make it a success. Use the SCHEMES mnemonic, below, to make sure that you cover all the bases:

- **S**pace.
- **C**ash.
- **H**elpers/people.
- **E**quipment.
- **M**aterials.
- **E**xpertise.
- **S**ystems.

(Not all projects will have considerations in each category. This mnemonic simply helps you to remember all of the key tasks that may apply.)

Note down your ideas in the table on the next page.

Space
Cash
Helpers/People
Equipment
Materials
Expertise
Systems

When you have a basic outline of what's required to complete your project successfully, you might be tempted to stop planning and start taking action straight away.

However, before you proceed, it's useful to take a moment to consider how your project fits into the three key project-management areas of **budget**, **scope** and **schedule**, and how changes in one area can affect the others as you go along. You can learn more about this in our article [The Iron Triangle of Project Management](#).

Once you've done this, you can break down your list of tasks into smaller, ordered, actionable steps. In the next section, we'll look at how you can use a Work Breakdown Structure (WBS) to do this.



Tip:

Collaborative project-management apps such as [Asana](#), [Trello](#) and [Basecamp](#) offer some great ways to visualize and organize Action Plans for small projects, and to record your progress. These apps can be scaled up for use on larger projects, too.



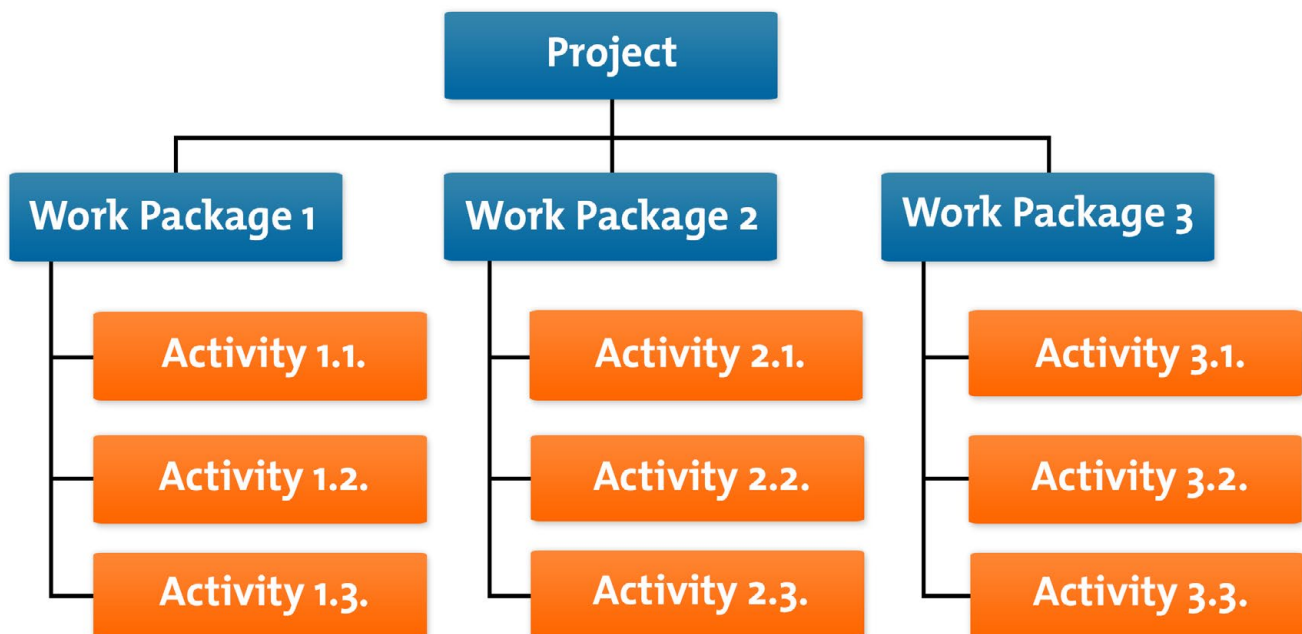
3. Work Breakdown Structures

Now that you've listed all of the tasks necessary to complete your project, you can start to shape your overall plan.

Many of the items in your Action Plan may turn out to be mini projects in their own right, so it's necessary to break each of them down into smaller steps before you can schedule them accurately.

You can use a Work Breakdown Structure (WBS) to organize the activities from your Action Plan into "work packages." You can then divide each of these work packages into individual, actionable steps. Figure 1, below, shows a typical WBS.

Figure 1: Three-Layer Work Breakdown Structure





Action:

Look at the tasks in your Action Plan and sort related items into the work packages that you need to complete.

As an example, imagine that you have been asked to reorganize your company's information storage. Your work packages might be:

- Secure permissions.
- Purchase software.
- Set up an information-storage system.
- Develop a policy.

Note down the work packages for your own project in the table below.

Work Packages
1.
2.
3.
4.
5.

It's almost time to start filling in your Work Breakdown Structure. But first, consider the order in which you'll complete your work packages.

For our information-storage example, we could start by developing a data-management policy, and build our plan from there. But what happens if the resources we need aren't included in the final approved budget? And, if we buy the software before we assess the amount and type of data that we need to store, how do we know that it will be suitable?

Carefully think through your own requirements before you dive in!



Action:

Use the template on [page 13](#) to create your Work Breakdown Structure. Start by writing the name of your project at the top. Then, in the second layer, note down your first three or four work packages in the order in which you should complete them.

Here's the order for our information-storage example:

- Secure permissions.
- Develop a policy.
- Purchase software.
- Set up an information-storage system.



Action:

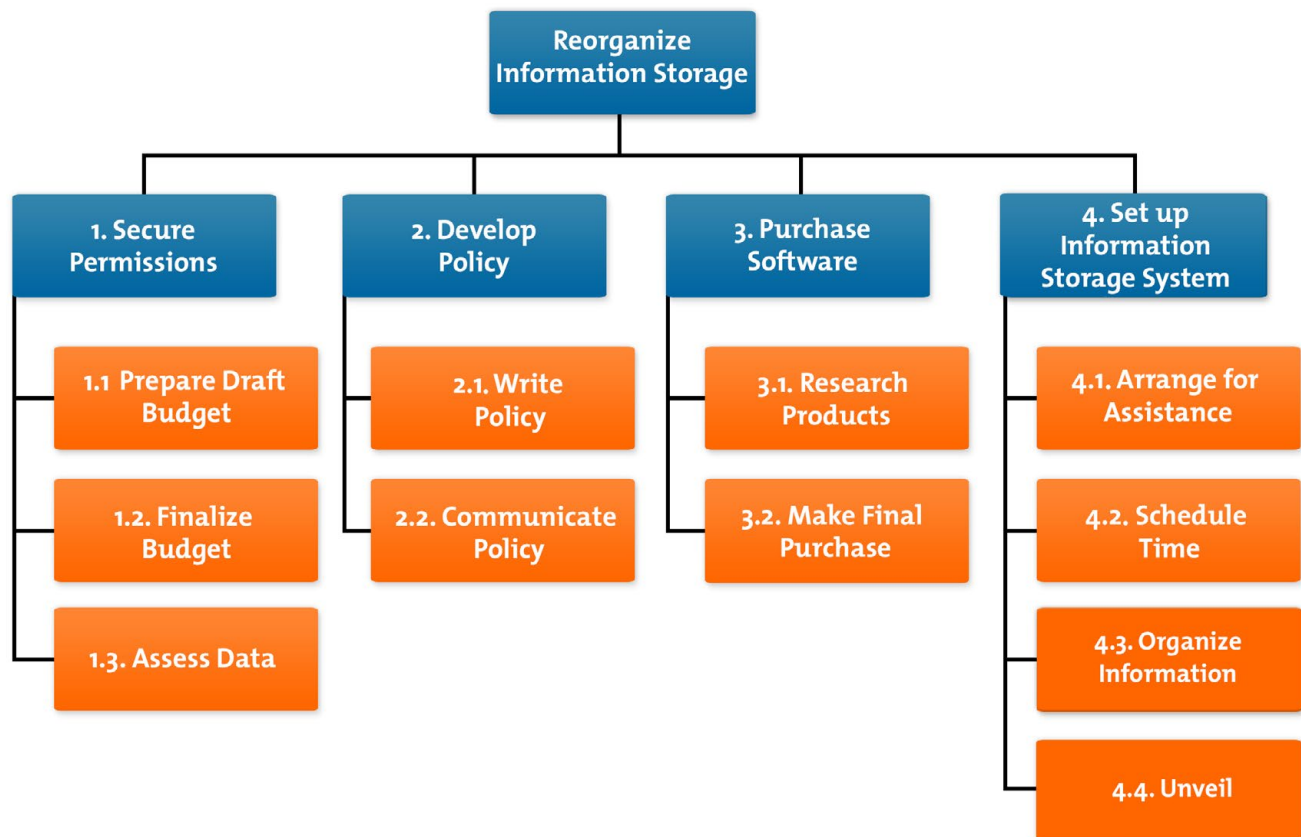
Next, look at each of your work packages in detail. What tasks do you need to complete to finish each package? Are they in a logical order? Be specific about what needs to be done.

Use your answers to fill in the third layer of the Work Breakdown Structure on [page 13](#).

A Work Breakdown Structure for our information-storage example is shown in figure 2, on the next page.

Finally, you need to determine exactly when you'll complete each task, and create a project timeline. We'll look at this in the next section.

Figure 2: Work Breakdown Structure Example



4. Gantt Charts

Completing an Action Plan or a Work Breakdown Structure is often sufficient for very small projects.

However, more-complex projects may require you to schedule tasks that are dependent on one another, to bring in different people at different times to perform certain tasks, or to meet specific deadlines. If this is the case, you'll need more structure in place to ensure that everything flows smoothly. (Don't assume that you can keep all of the details in your head, or that a simple To-Do List will suffice!)

A Gantt Chart is an effective way to provide the structure you need. It allows you to see what's already been done, which tasks are outstanding, and where one task depends on the completion of another.

There are many software packages and apps available that can help you to create your Gantt Chart, but paper and a pencil can work just fine for smaller projects.

Follow these steps to produce a Gantt Chart for your project:

1. Establish Timeframes

First, estimate how long it will take to complete each of the tasks in your Work Breakdown Structure. This isn't always easy, but you'll quickly improve as you gain experience.

Action:



Make a note of the estimated time you'll need for each of the tasks in your Work Breakdown Structure. Make sure that you build in plenty of contingency time to allow for unexpected delays. Record your estimated times at the bottom of each activity box in the template on [page 13](#).

2. Chart the Times and Task Relationships

Next, look at your Work Breakdown Structure as a whole, and at how the individual tasks relate to one another.



Action:

Using the template on [page 14](#), list your tasks and their relationships. In the first column, write down all of the specific tasks that you need to complete.

Then, consider how each task relates to the others. Fill in the rest of the chart as follows:

- **Possible start** – when will this task start? Immediately, or in one day, three days, one week, or two weeks?
- **Length** – write down your estimated times (minutes, hours, days).
- **Type** – is the activity sequential or parallel? A sequential task must be completed before or after another one. A parallel activity doesn't have to be done in sequence, but you may have to complete another task before you can start it.
- **Dependent on** – which sequential tasks do you have to complete first?

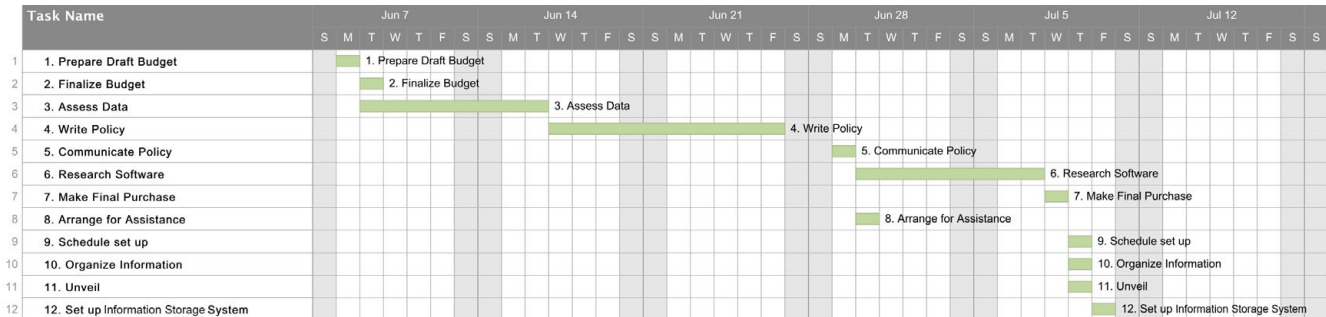
The task list for our example information-storage project is shown below.

Task	Possible Start	Length	Type	Dependent on...
1. Prepare Draft Budget	Immediate	1 day	Parallel	
2. Finalize Budget	1 week	1 day	Sequential	1
3. Assess Data	Immediate	1 week	Parallel	1
4. Write Policy	2 weeks	1.5 weeks	Sequential	2, 3
5. Communicate Policy	4 weeks	1 day	Parallel	4
6. Research Products	4 weeks	1 week	Sequential	2, 4, 5
7. Make Final Purchase	5 weeks	1 day	Sequential	6
8. Arrange for Assistance	4 weeks	1 day	Sequential	2, 4, 5
9. Schedule Setup	5 weeks	1 day	Sequential	7
10. Organize Information	5 weeks	1 day	Parallel	7
11. Unveil	5 weeks	1 day	Parallel	7
12. Set up Information-Storage System	5 weeks	1 day	Sequential	9

3. Plot the Tasks on a Gantt Chart

A Gantt Chart shows when you expect to complete tasks, where certain actions depend on others, and the sequence in which you must complete each task. This can help you to deliver the project efficiently, and at the earliest possible date.

A Gantt Chart for our information-storage example (made using [Smartsheet](#)) is shown below:



Tip:

Apps such as [Tom's Planner](#) and [Ganttter](#) can help you to plot and manage Gantt Charts effectively. You can also use spreadsheet programs, including Microsoft Excel, or project-management software such as [Wrike](#) or [Asana](#).

5. Key Points

Small projects require planning and preparation, just like large ones. The process may be less complex, but the same principles apply. By planning ahead, you can deliver small projects successfully, and you don't need special training or expensive project-management software.

You do, however, need to respect the planning process, and to create a realistic and organized schedule. By starting with a list of tasks and working your way methodically through the details, you can develop a plan that outlines your project's specifications and the timeframes for completion.

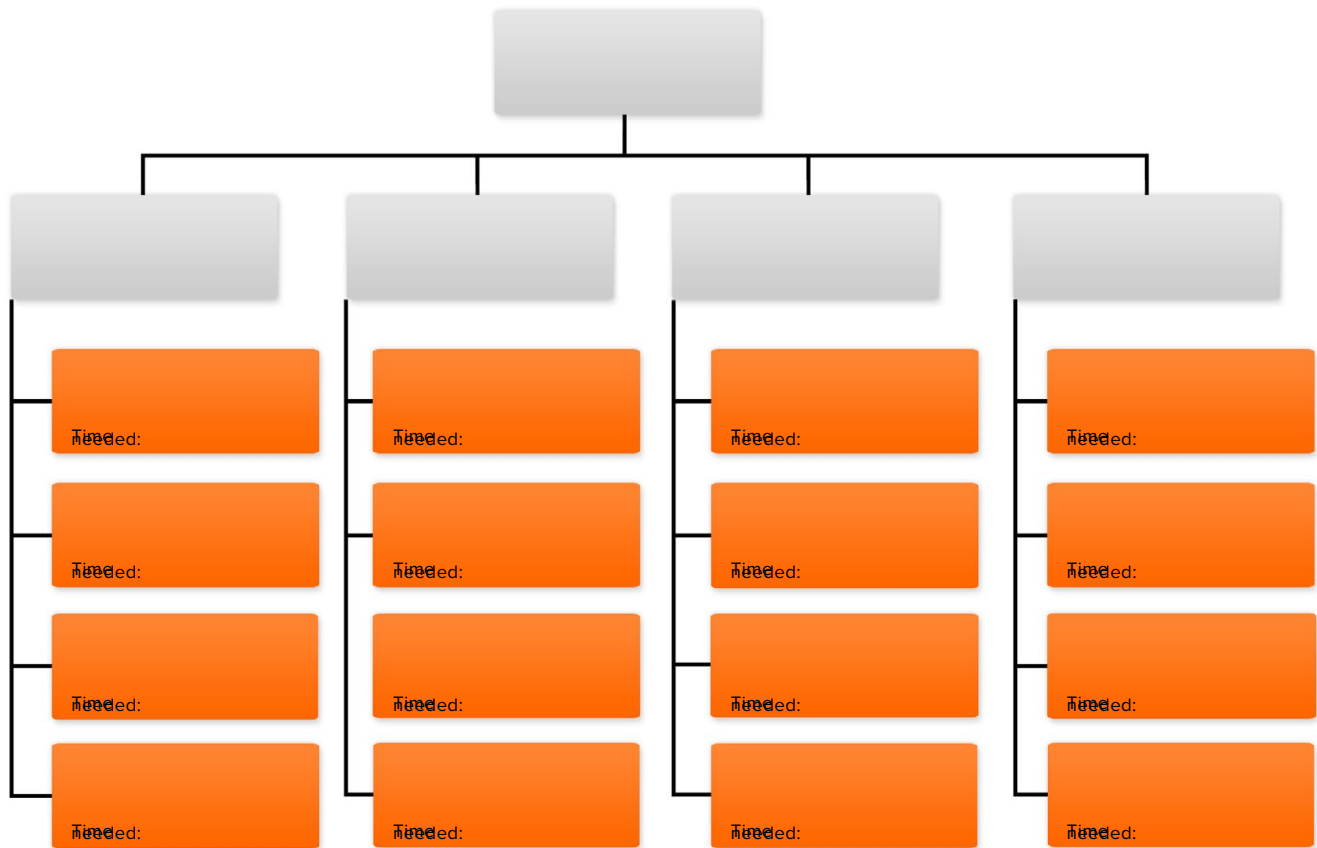
Using a simple Action Plan to list all of the tasks that you need to complete is the most efficient way to get started.

Then, use a Work Breakdown Structure to organize the activities from your Action Plan, and to break them down into smaller "work packages."

Finally, for projects where some tasks are dependent on others, that involve different people, or that have specific deadlines, it's a good idea to create a Gantt Chart to map out your schedules and keep track of your progress.

Don't make the mistake of thinking that small projects can be managed in your head. Put the right amount of effort into planning, and you'll achieve an end result that you can be proud of.

Work Breakdown Structure



Task List for Gantt Chart

Task	Possible Start	Length	Type	Dependent on...
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				