

from idea to reality

# playbook

PMEZ's free guidebook to get you moving  
towards your goals

version 3.1

think



shape



do



# FREE

**PMEZ**

*we tamed project management for you* <sup>TM</sup>



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## if you are a

small business owner  
solopreneur  
nonprofit leader  
community advocate  
artist or creator  
family organizer  
...

## with the goal to

launch a new product or service  
start a side hustle  
introduce a new program  
organize an event  
build or renovate a house  
...

## this guide will make it happen

**built for real-life ideas and goals**

*no systems or jargon required*

**proven with millions of people**

*it's project management tamed for regular people*

**loved by our students**

*the steps are intuitive and instantly helpful*

## use with our blank playbook

**to create a playbook specific to your goals**

*get the blank playbook at [pmez.org](https://pmez.org)*



# this guide provides a simple way achieve big goals

## how to use

pick only the steps you need for your situation

work through the steps in the order that is right for you

expect to iterate

get the **FREE blank playbook** from pmez.org to capture your work

**BUT** use any format that suits you.

all you need is a piece of paper and pencil

## quick tips

skip anything that doesn't feel helpful

*not every step is needed for every goal or idea*

plan to work on different steps at the same time

*don't worry about finishing one step before starting another*

tune the steps so they work for you

*the guide is a starting point to get you thinking*

# focus on progress, not perfection



# building your playbook

1. decide the steps you will use
2. follow the instructions for the steps from this guide
3. capture the results in your playbook  
*use the free blank playbook at [pmez.org](https://pmez.org) to get started*
4. check progress and adapt

## steps in the guide

### THINK

- ☐ define your outcome
- ☐ figure out the players

### SHAPE

- ☐ define the scope
- ☐ identify components
- ☐ understand resource needs
- ☐ create timeline\*
- ☐ manage risks

### DO

- ☐ check and adjust
- ☐ deal with change

\* we only cover how to create a simple timeline in this guide. If you'd like a visual timeline check out our 1-on-1 coaching services at [pmez.org](https://pmez.org)



# THINK



- ☐ outcome
- ☐ players

**transform your idea into a clear, realistic outcome**

**includes two steps**

define your outcome

*clarify your idea or goal*

figure out the players

*understand who needs to be involved*

think



shape



do





## define your outcome

*clarify your idea or goal*

### concepts

#### outcome

- the end result of your idea or goal
- the output of the work you put in
- the finish line you are working towards

### why it matters

provides a north star-

a clear direction guides your efforts

sustains enthusiasm-

a clear target helps maintains your morale

defines the finish line-

a clear end point shows when you are done

### approach

- ✓ visualize the end result
  - what is the final result or output?
  - what does success look like?
- ✓ make a short statement capturing what you visualized
- ✓ check the statement by asking
  - is it **observable**- it's a 'something' not an action or task
  - is it **realistic**- it's within your control, time, skills and budget
  - is there a clear **finish line**- you can pinpoint when you are done
- ✓ note important constraints like
  - budget
  - timeframe
  - assumptions
  - concerns/risks

### in the blank playbook

- on page 1, record your outcome(s)
- in the constraints, list important constraints like budget, timeframe and assumptions





## figure out the players

*understand who needs to be involved*

### concepts

#### players (or stakeholders)

- people working on the outcome
- people with knowledge or sway over decisions or resources
- people affected by the outcome

### why it matters

#### clarifies responsibilities-

everyone knows their role

#### prevents bottlenecks-

people are ready to work when needed

#### avoids blind spots-

different views are understood early

### approach

- ✓ list the people involved and their role
- ✓ decide each person's clout on the outcome
  - **key player**- directly affects the outcome
  - **helper**- can assist, provide resources, etc.
  - **influencer**- has knowledge or opinions that carry weight
  - **onlooker**- has opinions but no real influence
- ✓ plan an engagement approach based on clout & attitude
  - **active engagement**- key players and influencers
  - **targeted engagement**- helpers
  - **limited engagement**- onlookers
  - **guarded**- for anyone with a negative attitude, add "guarded" to the approach
- ✓ note anyone negative attitudes
  - be guarded
  - set boundaries

### in the blank playbook

- in the table on page 2 list person, role, clout and attitude
- decide the engagement approach and put an asterisk next any with a negative attitude to it to remind you to be on guard
- be careful about who sees the table



# SHAPE



- ☐ boundaries
- ☐ components
- ☐ resources
- ☐ timeline
- ☐ risks

## layout a solid game plan to achieve the outcome

### includes five steps

define the scope

*layout what's in and what's out*

identify components

*break it down to make it happen*

understand resource needs

*make sure you have what you need when you need it*

sketch a timeline

*line up your tasks so they get done*

manage risks

*spot and prevent trouble*

think



shape



do







## define the scope

*layout what's in and what's out*

### concepts

#### scope

- captures what is included in the outcome
- flags what is excluded in the outcome
- identifies any big things needed, behind the scenes, to achieve the outcome

### why it matters

**sets clear expectations-**

establishes the boundaries for the outcome

**provides structure**

highlights where chunks of work will be needed

**keeps you focused-**

prevents wasting effort on things out of scope

### approach

- ✓ **gather all of the ideas and suggestions for your outcome**
  - what have you promised?
  - what do others expect?
  - what you expect of yourself?
- ✓ **identify as in-scope the things that are essential for**
  - health, safety, legal reasons
  - basic operation, use, enjoyment
  - commitments or promises made
- ✓ **for the other ideas and suggestions, choose whether to**
  - **skip-** it's nice to have but not necessary
  - **simplify-** it's good to have, but in a smaller or easier form
  - **postpone-** it can wait for another time

### in the blank playbook

- in the first table on page 3, list the things that are in-scope
- in the second table, list things excluded
- add any notes about what was included or excluded and why





# identify components

*break it down to make it happen*

## concepts

### components

- are building blocks for something in-scope
  - are big things or features of something in scope
  - are used when something in-scope is big, complex or unfamiliar
- \*\*not all things in scope have or need components*

## why it matters

### organizes effort-

identifies the chunks of work needed and the underlying tasks

### reduces overwhelm-

components are smaller and more approachable to work on

### prevents forgetting something important-

defining components ensures you understand all of the pieces needed for things in scope

## approach

- ✓ look at each thing in scope and ask
  - does this seem really big or complicated
  - does this have different versions, phases, features, aspects, etc. to handle separately
    - ❖ *if so, then identify its components*
- ✓ then ask
  - am I confident I know make or create everything in scope – including any components?
    - ❖ *if not, research or consult with expert to assess whether other components are needed*
- ✓ then look at what's in scope and the components and decide if you want to group things differently





## understand resource needs

*make sure you have what you need when you need it*

### concepts

#### resources

- **people**- anyone contributing skills, labor or expertise
- **materials, equipment, supplies**- physical things
- **location and facilities**- space required for activities, etc.
- **other resources**- software, websites, licenses, training, etc.

### why it matters

#### prevents last-minute scrambling

knowing what you need ahead of time avoids surprises and delays

#### improves budgeting

understanding resources needed makes it easier to estimate costs

#### keeps work flowing smoothly

when everything is in place, work progresses without delays

### approach

- ✓ **for things in-scope and components note**
  - people are needed
  - materials, equipment, supplies required
  - location or facilities necessary
  - other resources like software, websites, licenses, training, etc. needed
- ✓ **check whether you have these resources ready-to-go**
- ✓ **if you don't, plan tasks to get them in place ahead of time**

### in the blank playbook

- use the resources worksheet
- in the first column, list your scope and any components
- list resources needed, whether they are at your disposal and any tasks required to get them in the other columns





## sketch the timeline

*line up your tasks so everything gets done on time*

### concepts

#### tasks

- actions or work to create components and scope
- usually includes a date when the task begins and ends

#### timeline

- tasks organized in a chronological order
- includes a way to identify when a task completes

### why it matters

**ensures your outcome is ready when needed-**

once you know what needs to happen and when you can estimate when your outcome can be available

**shows whether if you are on track-**

delays are easier to spot and handle with a timeline

**informs people what they need to do and when-**

prevents scrambling get help at the last minute

### approach

- ✓ **identify tasks to produce things in scope and components**
  - use high-level tasks for work that is understood or familiar
  - use more detailed tasks for work that are new or intricate
- ✓ **include tasks to get missing resources in place**
- ✓ **add start and end dates to the tasks**
- ✓ **put the tasks in order by start date**
- ✓ **step back and review the flow**
  - does the order make sense?
  - do the dates seem realistic?
  - can tasks, or even scope, be combined to make more sense?
- ✓ **add comments to explain special dependencies or concerns**

### in the blank playbook

- on page 4, list the scope item or component in the first column
- list the tasks needed
- add the start date and end date and any comments about dependencies or concerns





## manage risks

*spot and prevent trouble*

### concepts

#### risk

- possible future problem- it has not happened yet, but could
- outside of your full control
- changes over time- some fade, others grow and new ones pop up

### why it matters

#### avoids disruptions

when you spot risks early, you can make adjustments

#### provides perspective

helps you focus on real concerns, not improbable situations

#### reduces stress

shifts energy to action instead of worry

### approach

- ✓ write down the risks bothering you
- ✓ for each risk ask:
  - how likely is this to happen? (base it on facts, not feelings)
  - if it happens, how big is the impact (small, medium, large)
- ✓ for large risks- the ones that are likely to happen or cause serious trouble
  - look for ways to reduce the likelihood they happen (prevention)
  - think about a backup plan if a risk does happen (adjustment)

### in the blank playbook

- in first table on page 5, list the risks
- then add the likelihood and impact
- add a prevention or adjustment for risks that loom large



**DO**

- ☐ check
- ☐ change

**do the work and manage the inevitable detours  
along the way**

**includes two steps**

check and adjust

*review progress and update plans as needed*

deal with change

*decide to shift or not*

**think****shape****do**



## check and adjust

*review progress and update plans if needed*

### why it matters

**avoids surprises-**

you catch delays in time to correct them

**reduces stress-**

knowing what is really happening feels better than guessing

**builds confidence-**

adjusting puts you in control vs reacting

**prevents wasting time-**

solving small problems earlier avoids bigger messes later

### approach

- ✓ **decide when to check progress**
  - choose a rhythm that fits you- weekly, monthly, whatever makes sense
- ✓ **note tasks that have completed or should have completed**
  - what is taking longer or proving harder than expected?
  - what should have started by now, but has not?
- ✓ **decide how to handle these tasks**
  - **problem solve-** find ways to catch-up
  - **adapt-** adjust the timeline
  - **do nothing-** if it is minor no actions may be necessary
- ✓ **check on the risks**
  - if any are becoming more likely or impactful, decide to take preventative steps or establish a back-up plan

### in the blank playbook

- go back to the timeline from page 4
- based on the date you are checking, indicate in the status field if the task has completed or not
- update the comments if needed to record useful information





## deal with change

*decide to shift or not*

### concepts

#### change

- an idea, event or issue that affects the outcome
- impacts your scope, components or resources
- requires you to decide whether to shift or stay the course

### why it matters

#### keeps things in control-

a clear decision to shift is made, instead of drifting into it

#### keeps the timeline realistic-

new tasks are added to the timeline as appropriate

#### prevents chaos-

disruptive changes are spotted and given careful attention

### approach

- ✓ **when a change comes up, ask**
  - does this have to happen- yes or no
  - do you want this to happen- yes or no
- ✓ **if the answer is yes to either question, ask**
  - is the change realistic- can it fit into your time and available resources
- ✓ **and if this is also yes**
  - understand how the change affects the outcome, scope components, resources or tasks
  - update the timeline as needed

### in the blank playbook

- go to the second table on page 5
- list the potential change
- then note if it must happen or is desired to happen
- if either are yes, record if the change is realistic
- and if it is, list what needs to change with the outcome, scope, components, resources or tasks





# you've got this

Your playbook is more than a plan—it is your custom path for turning an idea into reality.

Remember- achieving an important goals rarely follows a straight line. Allow yourself to adapt, pause, or ask for help. What matters most is that you stay pointed toward your outcome.

For more support and downloads visit us at  
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