

from idea to reality

playbook

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

version 3.1

think



shape



do



PMEZ

we tamed project management for you TM



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if you are a

small business owner
entrepreneur
nonprofit leader
community advocate
artist or creator
family organizer
or someone with an important goal

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
or anything important to your life

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



this guide provides a simple way achieve big goals

how to use

all you need is a piece of paper and pencil

pick only the steps you need for your situation

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

expect to update things as you work through the steps

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

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 to get started
4. check progress and adapt

PMEZ PLAYBOOK

steps

 **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



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



1

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 (**outcome**)
 - what is the final result or output?
 - what does success look like?
- ✓ write down a short statement capturing the outcome 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 information like budget, timeframe and assumptions



2

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.
 - **persuaders**- 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 persuaders
 - **targeted engagement**- helpers
 - **limited engagement**- onlookers
 - **guarded**- for anyone with a negative attitude, add "guarded" to the approach

in the blank playbook

- in the players 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



3

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



4

identify components

break it down to make it happen

concepts

components

- are building blocks for something in-scope
- are big things or features for something in scope
- are used when something in-scope is big, complex or unfamiliar
- ❖ *IMPORTANT: not all scopes 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 experts to understand whether other components are needed*
- ✓ then look at what's in scope and the components and decide if you want to group things differently

in the blank playbook

- in the components table on page 4, list anything in-scope needing components in the first column
- in the second column, list the components



5

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 any 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 table on page 5
- 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



6

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 any 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 any missing resources**
- ✓ **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 be combined to make more sense?
- ✓ **add comments to explain special dependencies or concerns**

in the blank playbook

- on timeline table page 6, list the scope item or component in the first column
- list the tasks needed to create each scope or component
- add the start date and end date and any comments about interdependencies among the tasks or concerns



7

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 risks table on page 7, list each risk
- 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



8

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 to the timeline on page 6
- based on the date, indicate in the status column if the task has completed or not
- update the comments if needed to record useful information



9

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 change table on page 8
- 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
pmez.org



host a workshop for the PMEZ PLAYBOOK

in-person or virtual
from 5-50 participants

micro PMEZ PLAYBOOK

TWO *one-hour sessions*

Learn the practical, no-nonsense framework for bringing ideas to life and leave with a realistic **basic timeline** to achieve an important goal.

mini PMEZ PLAYBOOK

THREE *one-hour sessions*

Learn the practical, no-nonsense framework for bringing ideas to life and leave with a realistic **detailed timeline** to achieve an important goal.

total PMEZ PLAYBOOK

FOUR *one-hour sessions*

Learn the practical, no-nonsense framework for bringing ideas to life and leave with a realistic **detailed timeline** to achieve an important goal. Also, learn how to create a **visual timeline** to see at-a-glance what needs to be done.

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