



Finance Project Plan

Complete the following sections before you have assembled your team.

Project Leader Name	Role	Quarter
		Summer/Fall 2023

Requirements

Needs	Wants
-	-
Questions	Obstacles & Risks
-	-

Vision

<u>Long term (5 years)</u>
<u>Short-term (this year)</u>

Objectives & Key Results

Aim to create 3-5 Objectives and 3-5 Key Results per Objective for this specific plan. Connect your Objectives to your Vision & Requirements. "We will (objective), as measured by (key results)."

Objective 1 <ul style="list-style-type: none">● Key result A<ul style="list-style-type: none">○ Metric(s)● Key result B<ul style="list-style-type: none">○ Metric(s)

**Objective 2**

- Key result A
 - Metric(s)
- Key result B
 - Metric(s)

Objective 2

- Key result A
 - Metric(s)
- Key result B
 - Metric(s)

Project Team

Add your name if you're on this team.

Member Name	Role	Phone Number	Email
	Advisor		
	Chair		
	Lt Chair		
	Member		

Resources

List important documents for the team here.

- Group email: finance.committee@sigmanudavis.com
- [Committee Google Group](#)
- [Committee resource site](#)
- [Committee Google Folders](#)



Timeline

Outline key dates and significant milestones that outline when significant portions of the project are complete. We will use these dates in our calendar to track progress.

Important Dates

Date	Event Name/Description
January 1	Davis begins renewing leases
March 1	Chapter has all leases signed

Milestones

Identify points within the project that show significant progress has been made and add a tentative deadline before the project end date.

Project start date - 7/28/2023

- Milestone 1 - 8/7/2023
- Milestone 2 - 9/1/2023
- Milestone 3 - 11/1/2023

Project end date - 7/31/2024

Strategies, Initiatives & Tasks

In no particular order (yet), the following needs to be completed in order to achieve the goals through the strategy. Once you have a complete list, prioritize the list, add deadlines, and delegate to yourself or your project members. You can assign people by hovering over to the left of each checkbox.

Strategies, Initiatives, and Tactics



Tasks & Action Items

- ☒ ~~Complete project plan sections (Requirements, Vision, Project Team, Resources) before team meeting—Nick~~
- ☐ Review sections with team, add detail if needed, and agree on direction in meeting
- ☐ Brainstorm in the Objectives, Key Results/SMART Goals sections strategies, tactics, and ideas to achieve deliver on the requirements and the vision
- ☐ Create a list of projects (initiatives) & tasks to be assigned to your project team
- ☐ Create a rough Timeline with important dates and milestones either with team or afterwards for deadlines
- ☐ Share this document with your team and make sure it's saved in the appropriate Committee Folder in Drive

Working Notes

Crafting a vision

Brainstorming OKRs

Strategy 1 notes