



Creating Realistic Project Plans Using AI (And Humans!)

A BRIEF HANDBOOK OF AI-DRIVEN APPROACHES
TO PROJECT PLANNING



Thanks for picking up this handbook. It was crafted with love from a live, interactive session we did in August 2023, where we explored how AI can help you plan your projects right... and how it can go terribly wrong.

As with all good emerging technologies, things change fast, and I don't expect that all the information in this handbook will age well. But one thread of steel underpinned the entire conversation: AI tools are best used to drive human collaboration, not replace it.

So if you're reading this at a time where AI tools have long since evolved beyond their humble beginnings, hopefully you can treat this as an amusing historical record or cautionary tale to inform your current context.

Warm regards,

Galen Low

Co-Founder of The Digital Project Manager

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The Setup

The Thing About Project Planning

- No one has a crystal ball
- Everyone has an opinion on what the plan should include
- Any plan will almost certainly change

The Thing About AI

- We need to wrap our heads around it
- No one has 100% mastered it
- Most of us are a bit afraid of it

The Goal

To explore, test, and refine a few ideas for using AI-driven tools to enhance the way we plan projects.

The Tools

- ChatGPT
- Miro AI
- Tom's Planner



The Topics

- Building A Timeline
- Planning Resources
- Creating An Estimate
- Planning Sprints

AI Best Practices

A Few Best Practices

- **DO NOT** put sensitive information into tools like ChatGPT & Bard.
- **DO** treat it like a conversation, not a single command.
- **DO NOT** be afraid to be specific.
- **DO** a sense check! Don't expect the results to be 100% accurate and ready-to-ship.

The Scenario

Let's Pretend...

- You work for an agency
- You have an existing relationship with a baby shoe client
- Your clients are generally used to a fast turnaround

**You've received the
following email from your
client.**

The Client Email

Hey,

We've just got approval to get going with the **blog refresh project** you guys had recommended!

I know it's Aug 20 already, but it would be great if we could get the refreshed blog live in time for **Nov 16th!**

AstonBaby.com/blog hasn't had much love for a while. **We're really keen to improve the performance of the blog** - average visit duration is less than 1 minute, bounce rate is super high at 92% and page views average out at about 1.2/views/visit so barely anyone's actually going through to the product. Eek!

We'd love to know what you think, but we're thinking we should be able to fix all of this with a bit of a refresh. We're thinking it would be good to get a **new blog homepage** up and **post layout template** too, so it can be **a bit more visual**, and we can make sure we're linking between articles and providing a stronger link to the product **so that the blog helps us convert.**

Can you pull together a plan for what you'd suggest in terms of approach and timeline?

Rebecca

USE CASE 1

Checking Project Feasibility

How Might We Use AI Tools To...

**Help us break down the work
and see if it's even possible to
hit the deadline?**



Project Feasibility

ChatGPT Exploration

Goal

Quickly build out a high-level project plan with key activities that my team and I can discuss.

Approach

- Ask ChatGPT to frame out a project plan
- Refine (patiently) as necessary
- Along the way, don't be afraid to provide some context

Get Hands-On

<https://bit.ly/4at2Dmp>



Project Feasibility: ChatGPT Exploration

Prompt #1

"I've been asked lead a blog redesign project involving the design and a development of a new homepage template and a new blog post template.

The client is a baby shoe retailer. They would like to start by Sep 1 and launch the new blog by Nov 16. Some content migration will also be required.

Their goal is to increase the performance of the blog: increasing average visit duration, decreasing blog post bounce rate, increased the average page views per session, and increased click throughs to product pages.

Could you help me create a project plan for this project?"

QA

You

Hi! I've been asked lead a blog redesign project involving the design and a development of a new homepage template and a new blog post template. The client is a baby shoe retailer. They would like to start by Sep 1 and launch the new blog by Nov 16. Some content migration will also be required. Their goal is to increase the performance of the blog: increasing average visit duration, decreasing blog post bounce rate, increased the average page views per session, and increased click throughs to product pages. Could you help me create a project plan for this project?

Why the wall of text?!?!

LLMs can learn, so the more context you can provide, the more it has to work with. See all that context? It'll come into play later!



Project Feasibility: ChatGPT Exploration

Results #1

ChatGPT produced a pretty solid sketch with 8 phases and 2-3 key activities within each.

I was happy to see that Content Migration had its own phase, and also that the plan had clear traces of solution performance in terms of establishing and monitoring success metrics.

(See, the context helped me in the end!)

But don't ship this yet! This still doesn't tell me if I've got the people to pull this off, nor does it tell me if the plan is realistic for MY team! We'll dive deeper in the next use case!



ChatGPT

Of course, I'd be happy to help you create a project plan for the blog redesign project. Here's a step-by-step plan to guide you through the process:

1. Project Initiation (August 30 - September 1)

- **Kickoff Meeting:** Meet with the client to discuss project objectives, goals, and requirements. Clarify their vision for the new design and understand their brand identity.
- **Define Objectives:** Clearly outline the project's objectives, focusing on improving performance metrics such as visit duration, bounce rate, page views, and click-through rates.
- **Gather Resources:** Identify the team members who will be involved in the project. Assign roles and responsibilities, including design, development, content migration, and quality assurance.

2. Discovery and Research (September 2 - September 8)

- **Competitor Analysis:** Research competitors' blog designs and note their strengths and weaknesses. Identify design trends and strategies that could be incorporated into your redesign.
- **User Analysis:** Understand the target audience, their preferences, and behaviors. Create user personas to guide design decisions and content creation.
- **Content Audit:** Review the existing blog content to determine what needs to be migrated, updated, or removed. Categorize content for a smoother migration process.

3. Design Phase (September 9 - September 20)

Project Feasibility

Tom's Planner Exploration

Goal

Get a head start on a deeper dive into activities sequencing in a tool that can integrate with my project management software.

Approach

- Ask Tom's Planner to frame out a project plan as a Gantt chart
- Refine (patiently) as needed
- Along the way, don't be afraid to provide some context

Get A Demo Account

<https://bit.ly/488qLsV>

Project Feasibility: Tom's Planner Exploration

Prompt #1 (AI-Assist Feature)

"This is a project where we'll do a redesign of our shoe blog on our website. It would be good to get a new blog homepage up and post layout template too, so it can be a bit more visual, and we can make sure we're linking between articles and providing a stronger link to the product so that the blog helps us convert."

AI Powered Project Planning

About to start a new project? Type in a short description, and we'll create a custom-made Gantt chart for you.

Description*:
Note: you can keep your description brief, like 'build a house' or 'fly to Mars', or you can enter a more elaborate description.

This is a project where we'll do a redesign of our shoe blog on our website. It would be good to get a new blog homepage up and post layout template too, so it can be a bit more visual, and we can make sure we're linking between articles and providing a stronger link to the product so that the blog helps us convert.

[more options](#)

Create chart

By clicking the button here above you grant us permission to share your input in relation to this project with [OpenAI](#) for analysis and processing.

Project Feasibility: Tom's Planner Exploration

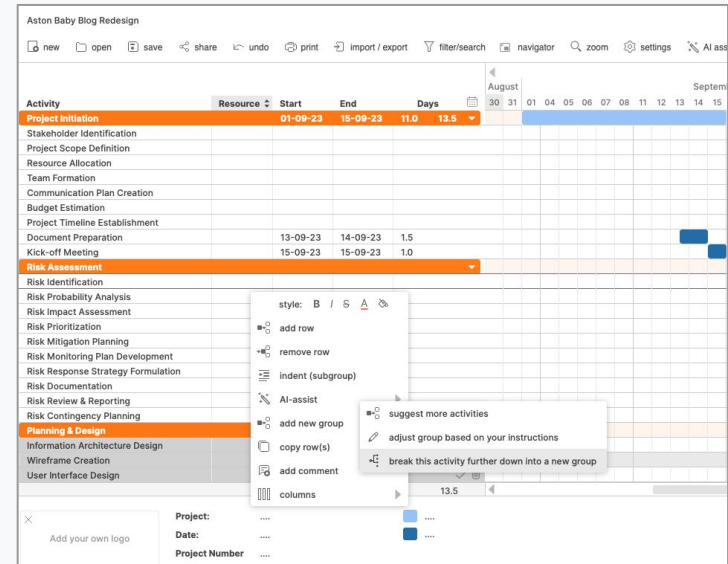
Results #1 (AI-Assist Feature)

Tom's Planner helped generate a few core groupings of activities which I was then able to expand and refine further using the AI Assist agent.

Some of the activities feel a bit stiff compared to my usual process — which is an easy fix — but I do wonder if I should have included more context in my prompt!

I appreciated that the tool didn't try to take things too far. The next step would be to work with the team to select the right activities, decide on sequencing and durations, and then see how realistic that deadline is!

Oh, and I could then export this to my PM tool, which is more than I can do with ChatGPT!





Project Feasibility

Miro Exploration

Goal

Get beyond blank stares from the team by zeroing in on some of the root causes driving the project brief, which can then inform our approach.

Approach

- Create a mind map of possible causes driving the challenge areas
- Create a mind map of ways the conversion goal can be achieved
- Discuss with the team and refine

Get Hands-On

<https://bit.ly/41NFS93>



Project Feasibility: Miro AI Exploration

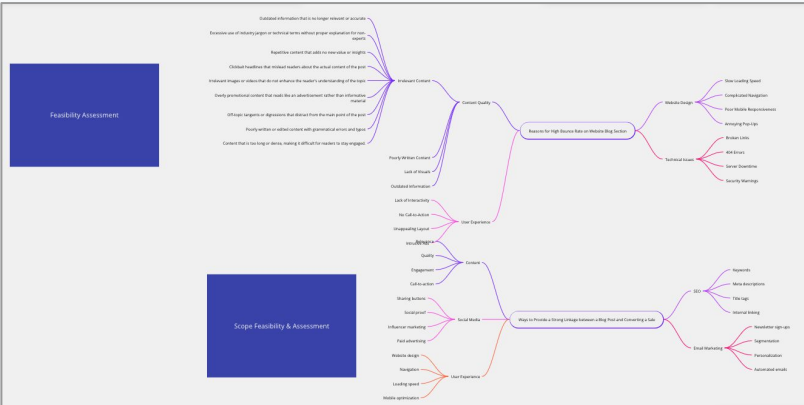
The Prompt (using MindMap)

- “Reasons for High Bounce Rate on Website Blog Section”
- “Ways to Provide a Strong Linkage between a Blog Post and Converting a Sale”

The Results

Miro AI did a great job of creating some larger supercategories before drilling into common issues that could be discussed.

This approach could help encourage a non-linear, outside-the-box approach to planning, using the root cause to solution instead of just making a timeline of what was asked of us.



USE CASE 2

Planning Team Resources

How Might We Use AI Tools To...

**Better understand what people
and skills we'll need on the
team to get the job done?**



Project Team Resourcing

ChatGPT Exploration

Goal

Get a sense of the team members I'd need on this project and make sure I haven't missed anyone!

Approach

- Ask ChatGPT to frame out a project team
- Refine (patiently) as necessary
- Along the way, don't be afraid to provide some context

Get Hands-On

<https://bit.ly/4at2Dmp>



Project Team Resourcing: ChatGPT Exploration

Prompt #2

Who might I need to involve in the project team to get this done?

Results #2

The response here was a sensible team, but at my agency I would skip the Web Developer if I have Front-End and Back-End Developer roles in there, so I could do a refinement pass here to remove or add roles and teach ChatGPT about my organization.

Either way, my next step would be to engage members of those teams to validate and expand upon it with the team — maybe with ChatGPT there to help!



You

Great! Who might I need to involve in the project team to get this done?



ChatGPT

To successfully execute the blog redesign project, you will need a diverse team with various skill sets. Here's a breakdown of the key roles you should consider involving in the project:

1. **Project Manager:** Responsible for overall project coordination, timeline management, communication with the client, and ensuring that all aspects of the project are on track.
2. **UI/UX Designer:** Creates visually appealing and user-friendly designs for the homepage and blog post templates. Focuses on layout, typography, color schemes, and overall user experience.
3. **Web Developer:** Translates the design mockups into functional website templates. Implements responsive design, optimizes code, and ensures smooth functionality.
4. **Front-End Developer:** Focuses on the user interface and interactive elements of the website, ensuring a seamless and engaging user experience across different devices.
5. **Back-End Developer:** Manages the technical aspects of the website, including server setup, database integration, and any custom functionality required.
6. **Content Specialist:** Assists with content migration, ensures proper formatting, and optimizes images and text for the new templates. Collaborates on SEO elements.
7. **SEO Specialist:** Reviews and optimizes the content for search engines, including meta titles, descriptions, keywords, and URL structures.
8. **Quality Assurance (QA) Tester:** Conducts thorough testing of the website on various devices and browsers to identify and resolve any issues before launch.



Project Team Resourcing

Miro Exploration

Goal

Understand what agency resources I'd need from a skills and expertise standpoint.

Approach

- Prompt Miro AI to create a set of stickies for each skill set
- Work with the team leads to identify where there may be skills gaps
- Resource the project accordingly

Get Hands-On

<https://bit.ly/41NFS93>



Project Team Resourcing: Miro AI Exploration

The Prompt (using Stickies)

“What digital agency resources do I need to complete a website blog refresh project?”

The Results

I kind of like that it framed things as skills instead of roles, which can be really important if people wear more than one hat at your organization (that never happens, right?).

I'd take these stickies and use them to build out a RACI instead of just blindly sending my traffic manager out to find a Social Media Marketing person when I actually may have that skill set in my Graphic Design resource, for example.



USE CASE 3

Creating A Ballpark Estimate

How Might We Use AI Tools To...

Create a ballpark estimate to start establishing the budget for this project?



Ballpark Estimation

ChatGPT Exploration

Goal

Try to get a sense of how much this project could cost so that I can test budget appetite with my buyer.

Approach

- Ask ChatGPT to help me generate a ballpark estimate
- Evaluate and refine as necessary

Get Hands-On

<https://bit.ly/4at2Dmp>



Ballpark Estimation: ChatGPT Exploration

Prompt #3

“How might I go about creating a ballpark estimate for this project assuming a team of 8 part-time team members for 10 weeks at a rate of \$100 / hr?”

Results #3

This got the job done, and I was happy to see that it included labor hours as well as additional costs.

However, I probably should have provided more context here and asked ChatGPT to speak to me as an expert.

My prompt was too generic and indicated that I was not an expert, hence the “beginner-level” response!



You

Thanks! How might I go about creating a ballpark estimate for this project assuming a team of 8 part-time team members for 10 weeks at a rate of \$100 / hr?



ChatGPT

Creating a ballpark estimate for a project involves considering various factors, such as the number of team members, their hourly rates, the duration of the project, and any potential additional costs. Here's how you might go about creating an estimate for your project:

1. Determine Total Hours: Calculate the total number of hours each team member is expected to contribute over the 10-week duration. Since you have 8 part-time team members, you need to determine the number of hours each will work per week.

2. Calculate Total Labor Cost: Multiply the total hours by the hourly rate for each team member to calculate their individual labor costs.

3. Sum Individual Costs: Sum up the individual labor costs to get the total labor cost for the project.

4. Include Additional Costs: Consider any additional costs that might arise during the project. This could include software licenses, stock images, hosting fees, or any other expenses specific to the project.

5. Calculate Grand Total: Add the total labor cost and any additional costs to calculate the estimated project cost.

Here's an example calculation:

USE CASE 4

What About Agile?

How Might We Use AI Tools To...

**Pivot our current project plan
to an agile methodology
rather than a waterfall-style
methodology?**



Planning For Agile

ChatGPT Exploration

Goal

Take some of the legwork out of converting a predictive project plan to a more adaptive project plan (using Scrum as the example).

Approach

- Ask ChatGPT to divide our project plan into 2-week sprints
- Along the way, don't be afraid to provide some context

Get Hands-On

<https://bit.ly/4at2Dmp>



Project Team Resourcing: ChatGPT Exploration

Prompt #4

"The client would actually like to try a sprint-based approach that loosely follows the Scrum Agile methodology.

They would appoint a product owner to make decisions at key scrum ceremonies like sprint planning sessions, sprint reviews, and backlog grooming sessions.

Could you break up the project plan into 2-week sprints?

Please provide the output as a table with the goal and key activities described for each sprint."

GA

You

Thanks so much! The client would actually like to try a sprint-based approach that loosely follows the Scrum Agile methodology. They would appoint a product owner to make decisions at key scrum ceremonies like sprint planning sessions, sprint reviews, and backlog grooming sessions. Could you break up the project plan into 2-week sprints? Please provide the output as a table with the goal and key activities described for each sprint.

Why a table?

ChatGPT can output a lot of different formats. I want to see if I can paste the plan into a spreadsheet as a shared working doc.




Project Team Resourcing: ChatGPT Exploration

Results #4

I mean, I know that this approach isn't the same as planning an agile project, but I do think this use case happens more often than you'd think!

I like that ChatGPT divided the tasks into sprints and put it into a table, but I was getting some weird line breaks that probably wouldn't paste well into a doc or a spreadsheet, so you can see my refinement on the next page.

But overall, I think this gives us a fair starting point with the team about how this project could use an agile approach, and what user stories we'd need to define to plan and estimate it properly.

 ChatGPT Certainly! Below is a breakdown of the project plan into 2-week sprints, following a sprint-based approach loosely based on the Scrum Agile methodology. Each sprint consists of key goals and activities to be accomplished during that time frame.		
Sprint	Duration	Goal and Key Activities
1	Sep 1 - Sep 14	Goal: Project Initiation and Planning - Kickoff meeting with the client - Define project objectives and requirements - Assign roles and responsibilities - Identify initial team and set up communication channels - Initial research and competitor analysis
2	Sep 15 - Sep 28	Goal: Discovery and Research - User analysis and creation of user personas - In-depth competitor analysis - Content audit and categorization for migration - Initial design discussions and ideation
3	Sep 29 - Oct 12	Goal: Design Phase - Present initial design concepts to the client - Collect and incorporate client feedback - Finalize homepage design - Initiate blog post template design
4	Oct 13 - Oct 26	Goal: Design Phase (Continued) - Present blog post template design to the client - Collect and incorporate feedback - Finalize blog post template design - Initiate development of homepage template
5	Oct 27 - Nov 9	Goal: Development - Develop homepage template - Begin content migration process - Set up version control and project management tools - Initial testing of homepage template



Project Team Resourcing: ChatGPT Exploration

Refinement

Here's the refinement from the table view. The table was nice, but it had some formatting issues.

I made ChatGPT aware of those issues, and it presented me with two different layout options (you can see them both by clicking the small left-and-right arrows under the response if you are using the "get hands-on" link).

The one I selected felt like it would sit better in an email or a draft scope statement — mostly to communicate an idea of the plan, not necessarily as something that would be signed off!



You

Great! Looks like the HTML line break tag is showing in that table. Could we either remove the `
` tags or take the output out of the table format?



ChatGPT

Certainly! Here's the project plan with the HTML line break tags removed and presented in a simple list format:

Sprint 1 (Sep 1 - Sep 14): Project Initiation and Planning

- * Kickoff meeting with the client
- * Define project objectives and requirements
- * Assign roles and responsibilities
- * Identify initial team and set up communication channels
- * Initial research and competitor analysis

Sprint 2 (Sep 15 - Sep 28): Discovery and Research

- * User analysis and creation of user personas
- * In-depth competitor analysis
- * Content audit and categorization for migration
- * Initial design discussions and ideation

Sprint 3 (Sep 29 - Oct 12): Design Phase

- * Present initial design concepts to the client

Conclusions

What We Learned

While it's hard to draw any firm conclusions in a 60-minute working session, here are the key things to take away:

- When it comes to planning, almost anything is better than the paralysis of a blank slate, and most LLMs today are capable of producing quite reasonable project plans with the right context and inputs.
- While platforms like ChatGPT are growing rapidly both technologically and in popularity, other AI-driven tools specific to project management are emerging, making the prompting process more embedded.
- As with any application of this technology, most AI-generated project plans are going to need to be tailored to your team and your organization. That can be done through refinements in the conversation or through human intervention.
- All in all, we are probably not all that far away from LLMs trained on organizational data that will produce realistic project plans at the first pass. But for now I feel that the human part of the planning process is part of what builds the cohesion and momentum that helps a project go well.

About The DPM School

Get Confident Controlling Complex Projects

Practical Training To Take Your Project
Management Skills To The Next Level

dpm SCHOOL



Today we covered some
**core principles for
planning projects**

All of this and more is covered
in our certificate program,
**Mastering Digital Project
Management**

What Is Mastering Digital Project Management?

In a nutshell, it's a hyperdrive for transforming the way you lead projects in a digital context. Step through real-world scenarios, get hands-on practice, and discuss your approach with your instructors and peers.

After this course, you'll be more in control of your projects; you'll be more confident in your planning; you'll be more comfortable pivoting when things don't go to plan; and you'll stop scrambling to keep up.

Learn more here:
<https://dpmschool.com>



If you're interested in getting more involved in the DPM community or have any questions, please get in touch!

Galen Low

galen@thedigitalprojectmanager.com