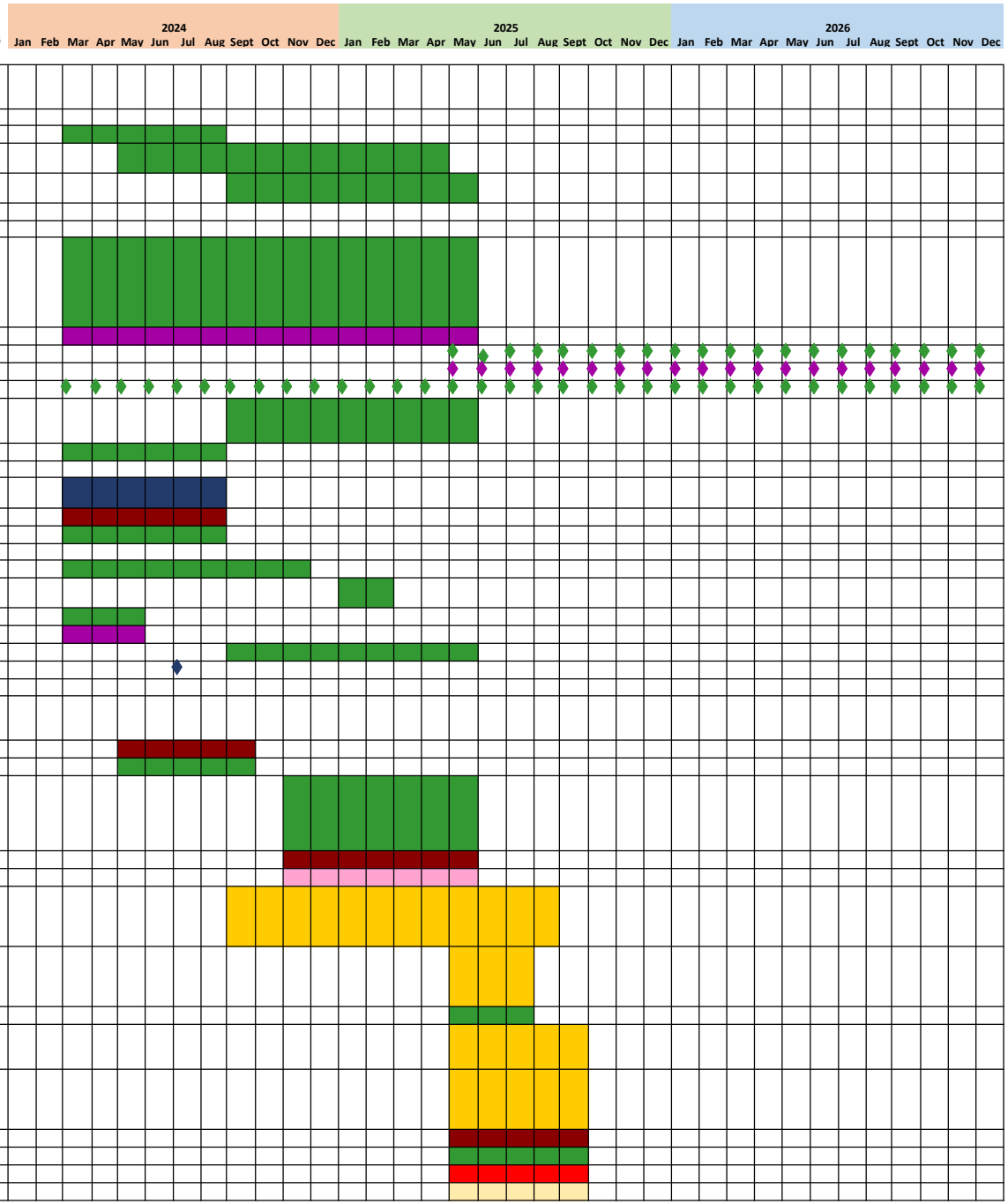
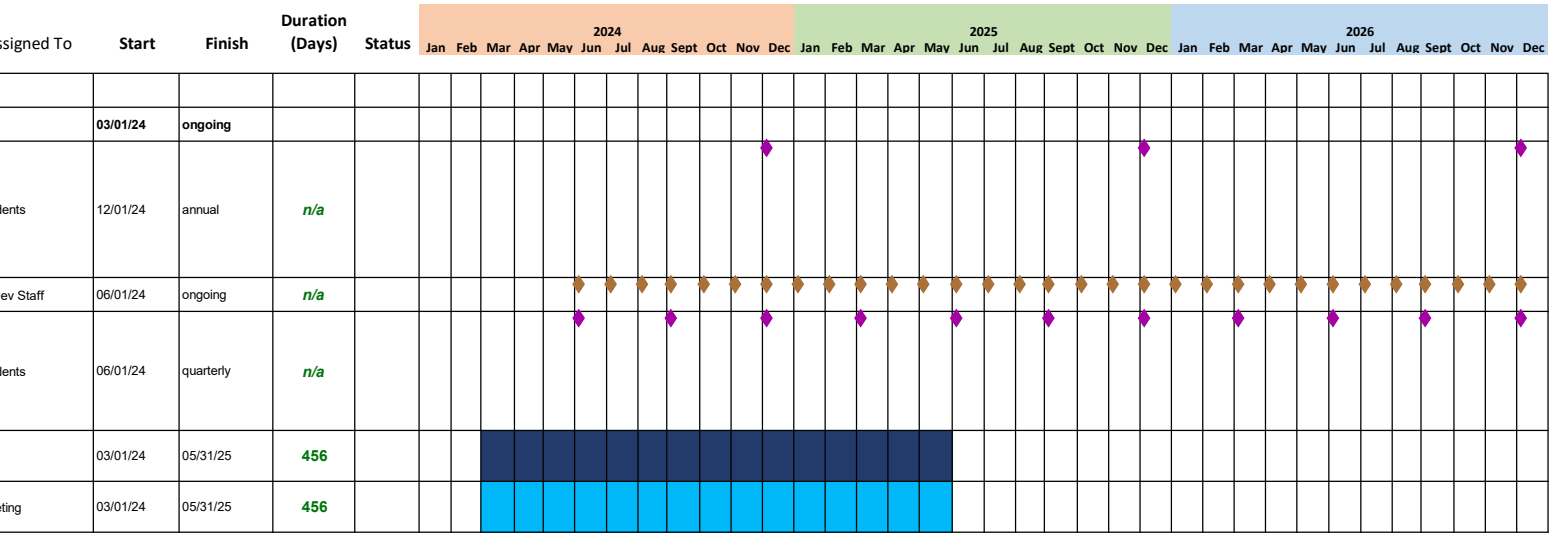
Sample Project Plan

Row #	Task Name	Assigned To	Start	Finish	Duration (Days)	Status
1	**Human Capital Planning**	**Larry**	**03/01/24**	**ongoing**	***n/a***	
1.1	**Make list of 3-5 firms to research**					
1.1.1	**Hire additional HR recruiting resource**	HR	03/01/24	08/31/24	**183**	
1.1.2	**Provide Interviewing/New Hire Training for management personnel.**	HR	05/01/24	04/30/25	**364**	
1.1.3	**Solidify college recruiting process to attrace better talent at college level**	HR	09/01/24	05/31/25	**272**	
1.1.4	**Develop process for recruiting senior talent**	HR	09/01/24	05/31/25	**272**	
1.2	**Training**					
1.2.1a	**Design more structured training in the areas of (program with external & internal components developed):** **a) Project Management** **b) Business Development (Link to 4.2.2)** **c) COE (Link to 3)**	HR	03/01/24	05/31/25	**456**	
1.2.1a	*See above*	Presidents	03/01/24	05/31/25	**456**	
1.2.1b	**Implement training program**	HR	05/01/25	ongoing	***n/a***	
1.2.1b	*See above*	Presidents	05/01/25	ongoing	***n/a***	
1.2.2	**Leadership Development**	HR	03/01/24	ongoing	***n/a***	
1.2.3a	**Create a structure that necessitates training for certain promotions and advancement opportunities**	HR	09/01/24	05/31/25	**272**	
1.2.3b	**Implement structure**	HR	03/01/24	08/31/24	**183**	
1.3	**Compensation Matrix**					
1.3.1	**Design and implement new incentive & bonus structure**	CEO	03/01/24	08/31/24	**183**	
1.3.1	*See above*	CFO	03/01/24	08/31/24	**183**	
1.3.1	*See above*	VP Talent	03/01/24	08/31/24	**183**	
1.4	**Retention**					
1.4.1	**Develop stronger onboarding strategy/process**	HR	03/01/24	11/30/24	**274**	
1.4.2	**Implement onboarding strategy/process in 3rd Qtr**	HR	01/01/25	02/28/25	**90**	
1.4.3	**New office location (decision to be made)**	HR	03/01/24	05/31/25	**456**	
1.4.3	*See above*	Presidents	03/01/24	05/31/25	**456**	
1.4.4	**Travel Guidelines (handbook for all locations)**	HR	09/01/24	05/31/25	**272**	
1.4.5	**Travel expectations/philosophy**	CEO	07/01/24	07/01/24	**1**	
2	**Technology Plan**	**Jane**	**05/01/24**	**07/31/26**	**821**	
2.1	**Hire consultants to scope**	CFO	05/01/24	09/30/24	**152**	
2.1	*See above*	HR	05/01/24	09/30/24	**152**	
2.2	**Create and fill a high-level position (Director, CIO, etc) to provide leadership and guidance to all information technology initiatives. Candidate should possess significant expertise in the construction industry.**	HR	11/01/24	05/31/25	**211**	
2.2	*See above*	CFO	11/01/24	05/31/25	**211**	
2.2	*See above*	Consultant	11/01/24	05/31/25	**211**	
2.3	**Assemble an internal team tasked with dev eloping a specification manual that outlines the systems requirements for all facets of our business**	IT	09/01/24	08/31/25	**364**	
2.4	**Create organizational clarity with well-defined roles and responsibilities for all members of the technology and information management departments.**	IT	05/01/25	07/31/25	**91**	
2.4	*See above*	HR	05/01/25	07/31/25	**91**	
2.5	**Develop technology plan - clear, concise direction for all technology related initiatives, both internally and externally (field/office).**	IT	05/01/25	09/30/25	**152**	
2.6	**Led by the new technology person and utilizing the internal team, begin the research necessary to identify if there are any on-shelf systems that are available to meet our needs.**	IT	05/01/25	09/30/25	**152**	
2.6	*See above*	CFO	05/01/25	09/30/25	**152**	
2.6	*See above*	HR	05/01/25	09/30/25	**152**	
2.6	*See above*	Operations	05/01/25	09/30/25	**152**	
2.6	*See above*	Safety	05/01/25	09/30/25	**152**	



Row #	Task Name	Assigned To	Start	Finish	Duration (Days)	Status
2.7	**Select (type), purchase (create), train and implement new system**	IT	10/01/25	07/31/26	303	
3	**Acquisition Strategy** *(Captures process and timing, dates may vary & repeat for each acquisition.)*	John	03/01/24	05/31/26	821	
3.1	**Hire investment banking firm to assist in this effort**	CEO			Complete	
3.1	*See above*	CFO			Complete	
3.2	**Define criteria for investment firm - size, culture, management, market**	CEO			Complete	
3.2	*See above*	CFO			Complete	
3.3	**Have investment firm search the market**	Consultant	03/01/24	05/31/25	456	
3.4	**High level CEO to CEO discussion with possible candidates**	CEO	06/01/24	11/30/24	182	
3.5	**Non disclosure agreements**	CEO	12/01/24	02/28/25	89	
3.5	*See above*	Legal	12/01/24	02/28/25	89	
3.6	**Financials/modeling/valuation**	CFO	12/01/24	02/28/25	89	
3.6	*See above*	Consultant	12/01/24	02/28/25	89	
3.7	**Letter of intent**	Consultant	12/01/24	02/28/25	89	
3.7	*See above*	CEO	12/01/24	02/28/25	89	
3.8	**Due diligence process**					
3.8.1	**Market/Industry analysis**	Consultant	12/01/24	02/28/25	89	
3.8.1	*See above*	Presidents	12/01/24	02/28/25	89	
3.8.2	**Customer attractiveness**	Consultant	12/01/24	02/28/25	89	
3.8.2	*See above*	Presidents	12/01/24	02/28/25	89	
3.8.3	**People/management/human resources**	VP Talent	12/01/24	02/28/25	89	
3.8.4	**Insurance**	Consultant	12/01/24	02/28/25	89	
3.8.5	**Legal**	Legal	12/01/24	02/28/25	89	
3.8.6	**Operations:** **Facilities** **Estimating** **Project management** **Systems and processes**	Presidents	12/01/24	02/28/25	89	
3.8.6	*See above*	Operations	12/01/24	02/28/25	89	
3.8.7	**Safety**	Consultant	12/01/24	02/28/25	89	
3.8.7	*See above*	Safety Director	12/01/24	02/28/25	89	
3.8.8	**IT**	IT	12/01/24	02/28/25	89	
3.8.9	**Accounting/financial/taxes**	CEO	12/01/24	02/28/25	89	
3.8.9	*See above*	Consultant	12/01/24	02/28/25	89	
3.8.10	**Trustee/ESOP valuator involvement (depending on size)**	Consultant	03/01/25	05/31/25	91	
3.8.11	**BOD approval**	Board of Directors	03/01/25	05/31/25	91	
3.8.12	**Financing**	Consultant	03/01/25	05/31/25	91	
3.8.12	*See above*	CFO	03/01/25	05/31/25	91	
3.8.13	**Legal**	Consultant	03/01/25	05/31/25	91	
3.8.13	*See above*	Legal	03/01/25	05/31/25	91	
3.8.14	**Closing**	Consultant	03/01/25	05/31/25	91	
3.8.14	*See above*	CEO	03/01/25	05/31/25	91	
3.8.15	**Develop strategy to integrate**	Operations	01/01/25	07/31/25	211	
3.8.16	**Implement/Ingegrate (includes various resources)**	Operations	03/01/25	Ongoing	*n/a*	
4	**Business Development**	Nancy	02/01/24	ongoing	*n/a*	
4.1	**Increase customer retention as defined by corporate strategic plan**					
4.1.1	**Implement a Customer Relationship Management (CRM) system within each brand. Steps to execute the following include:**		02/01/24	12/31/24	334	
4.1.1a	**Determining a champion for the effort**	Marketing	02/01/24	04/30/24	89	
4.1.1b	**Evaluating CRM systems**	Marketing	05/01/24	07/31/24	91	
4.1.1b	*See above*	Presidents	05/01/24	07/31/24	91	
4.1.1c	**Implementing the system**	CRM Champion/Mktg	08/01/24	12/31/24	152	
4.1.1d	**Training all parties to use the system**	CRM Champion/Mktg	08/01/24	12/31/24	91	
4.1.2	**Develop marketing plan targeted at existing customers**	Marketing	02/01/24	04/30/24	89	

Row #	Task Name	Assigned To	Start	Finish	Duration (Days)	Status
4.2	**Drive growth with new business as defined by the corporate strategic plan.**					
4.2.1	**Implement CRM** **Link to 4.1.1**		**03/01/24**	**ongoing**		
4.2.2	**Provide formal sales training for all business development staff, to be completed once a year by an outside sales trainer with new staff. Each member of business development will be required to attend training. Presidents will be responsible for entering all sales staff into the training.** **Link to 1.2.1**	Presidents	12/01/24	annual	***n/a***	
4.2.3	**Initiate bi-weekly calls between business development staff**	Bus Dev Staff	06/01/24	ongoing	***n/a***	
4.2.4	**Require quarterly in-person presentations by BD staff during subsidiary board of directors meetings. These meetings will provide updates on new business pursuits and overall sales strategies. The OC will determine with staff present - those associated with vertical markets only or also locally-focused people.**	Presidents	06/01/24	quarterly	***n/a***	
4.2.5	**Determine reporting structure/rules of engagement and compensation strategy for Business Development staff.**	CEO	03/01/24	05/31/25	**456**	
4.2.6	**Evaluate if a new position at corporate is necessary to manage sales strategies and provide oversight to BD staff nationally.**	Marketing	03/01/24	05/31/25	**456**	



Safety	Operations
Legal	Board of Directors
CEO	Presidents
Consultants	HR / VP Talent
CFO / Finance	Marketing
Business Development	IT
♦ Periodic	