

# The **Swiftlight** Toolkit for Consultants

## **Swiftlight**® Project Management Software *"The visual planning tool for consultants"*

**Torridon Solutions Limited**  
**London. New York.**

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### Purpose

- The purpose of this toolkit is three-fold:
  - 1) To help position Swiftlight so that you better understand where and how to use Swiftlight (and when not to use it);
  - 2) To give you practical, real-world ideas about where, when and how to use Swiftlight effectively;
  - 3) To provide examples files that you can use and adapt rather than building plans from scratch.

### Who is it for?

- Both new and existing users
  - If you are new to Swiftlight, we hope this toolkit gives you some idea of Swiftlight's utility, flexibility and power, as well as helpful templates and tips
  - If you are already a user of Swiftlight, we hope it gives you new ideas and tips that will help you get even more out of Swiftlight

Overall, we hope you find this toolkit useful and, as always, we welcome your feedback.

The Swiftlight Team, Torridon Solutions

Email: [support@torridonsolutions.com](mailto:support@torridonsolutions.com)

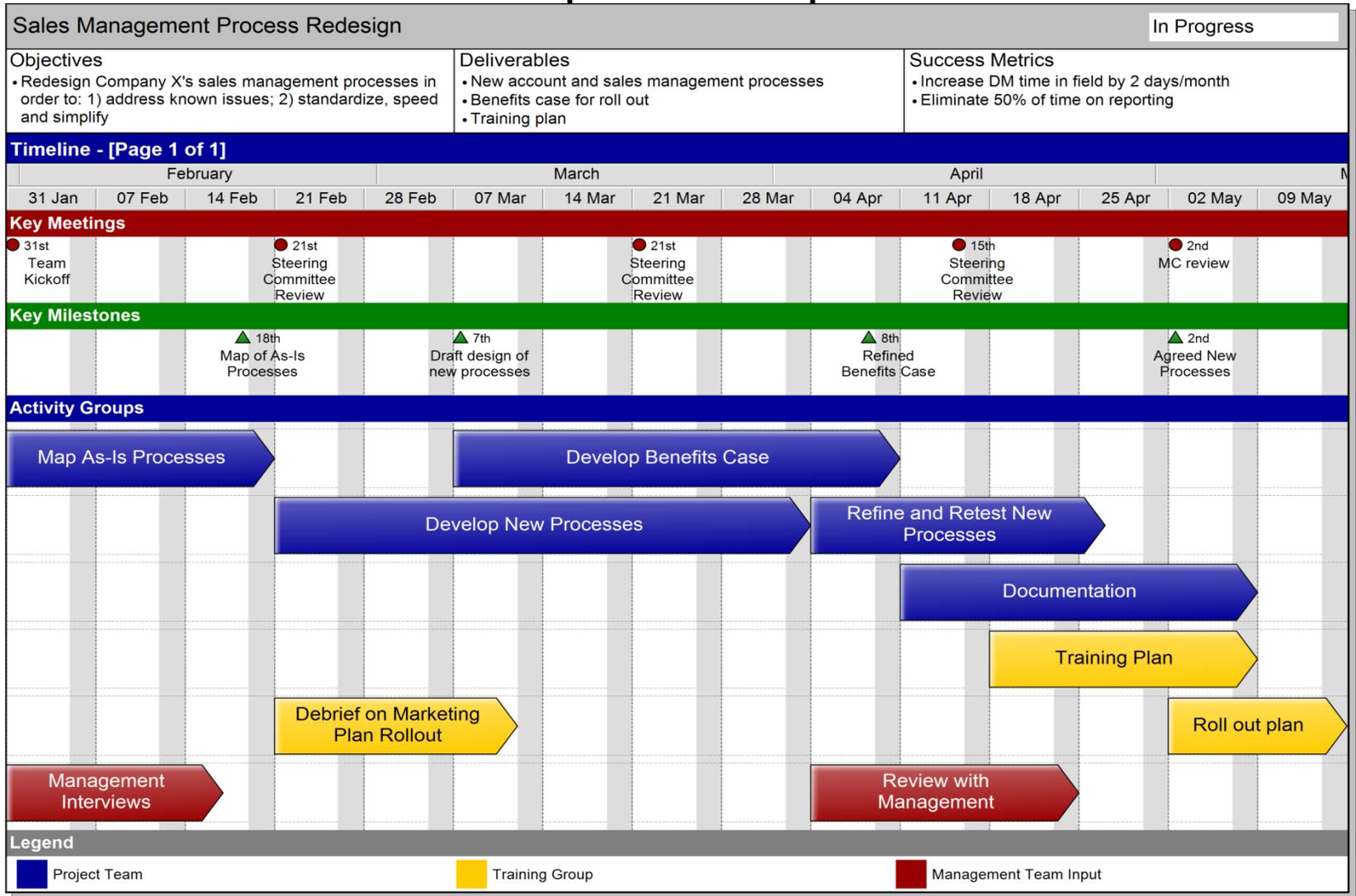
### • Introduction to Swiftlight

- Seven Uses of Swiftlight
  - 1) Timelines (and other outputs) for proposals / meetings
  - 2) Real-time creation of project plans in client meetings
  - 3) Program office: high level perspectives on a portfolio of initiatives
  - 4) In depth project management of an active engagement
  - 5) Structured planning for junior team members
  - 6) Leveraging the links between Swiftlight and MS Project
  - 7) Partner perspective: overseeing multiple projects
- Tips
  - Changing terminology in Swiftlight
  - Adapting colours / fonts to create a customized file
  - Other
- Links to example files

**Swiftlight's unique blend of a planning structure, high quality "PowerPoint-like" graphics and outstanding ease of use provides consultants with an easy, visual tool for both project management and client communication**



**Example Timeline Output**



# Swiftlight

## What it isn't. What it is.

### What it isn't

- A competitor of large project or portfolio systems
- A replacement for Microsoft Project
- A complex, integrated system

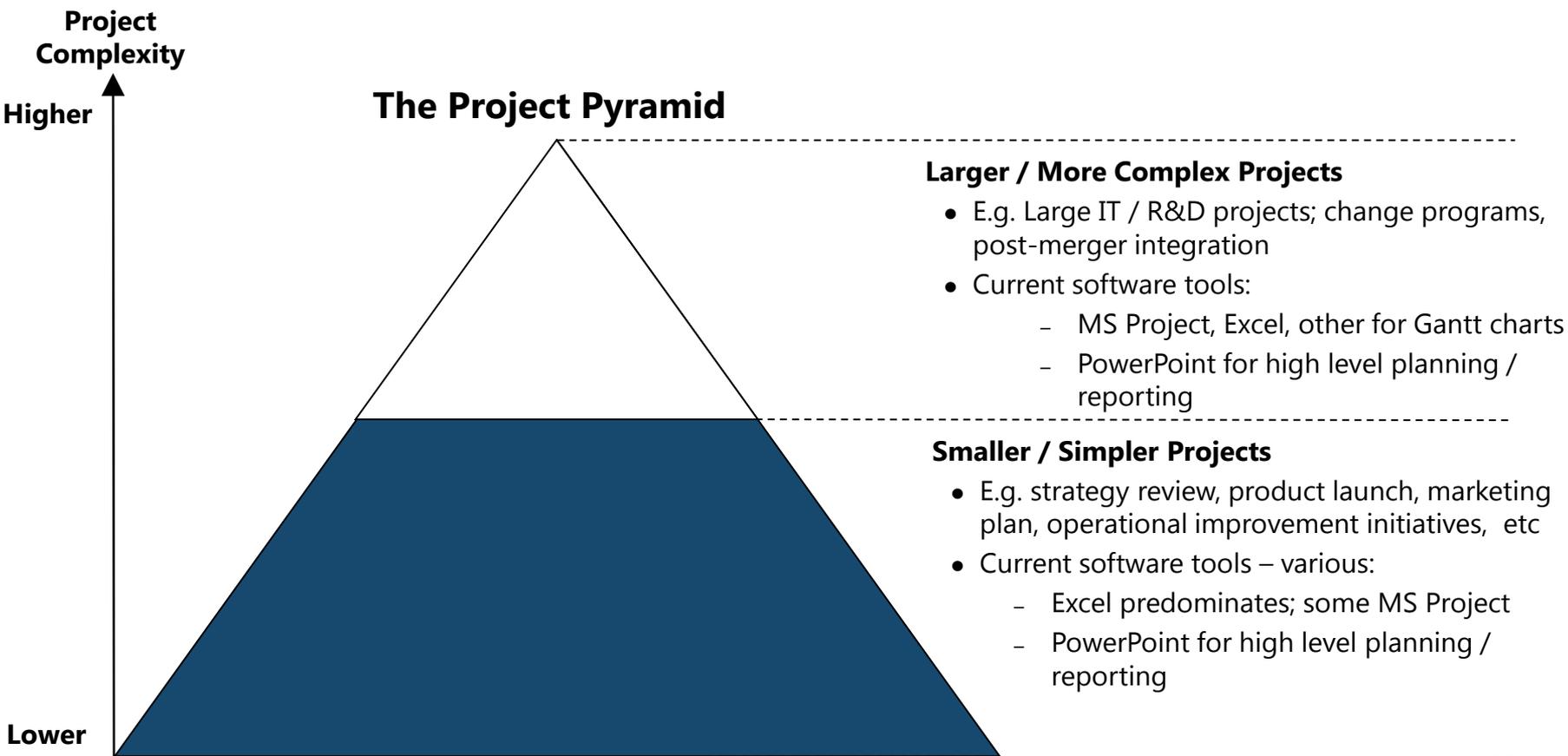
### What it is

- A light, low cost desktop application for Windows PCs
  - Easier, simpler and with better graphics than MS Project
  - Faster and more structured than using Excel / PowerPoint for planning
- A productivity tool for busy consultants and managers - saving time and creating clarity vs the alternatives
- Low cost, low risk
  - Significantly cheaper than MS Project
  - Not linked to critical systems
  - Low / zero training requirement

# Swiftlight

## Where does it fit?

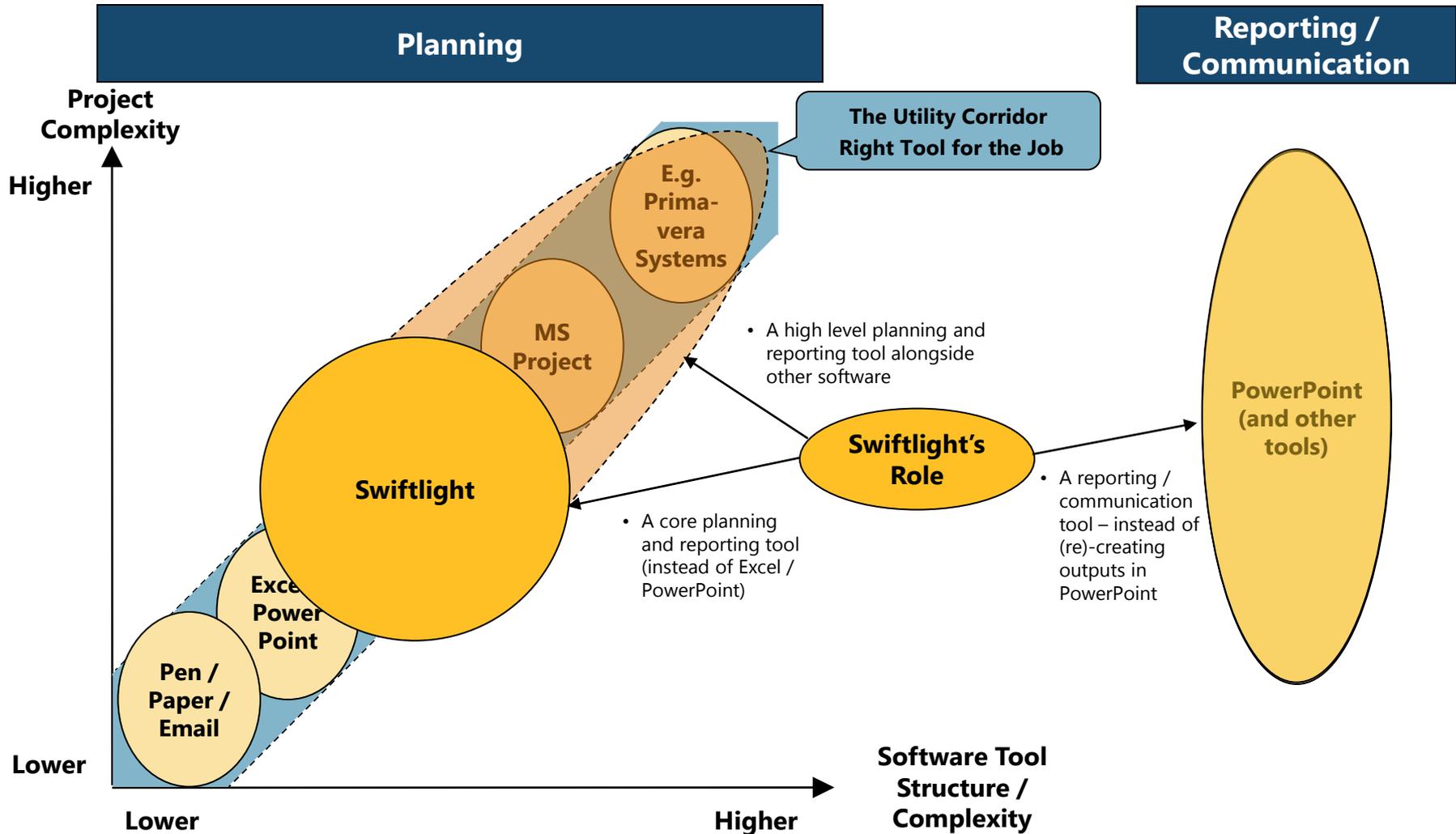
- Consultants may be engaged on projects that span the range in terms of size and complexity...



# Swiftlight

## Where does it fit?

- Swiftlight helps by filling the gap between spreadsheets and MS Project for “smaller/simpler projects”, acting as a valuable high level planning tool for the more complex, and addressing both planning and reporting needs

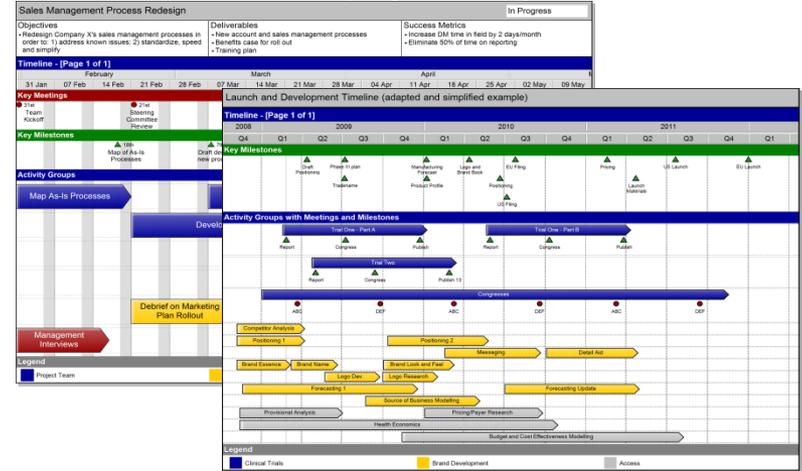


# Swiftlight

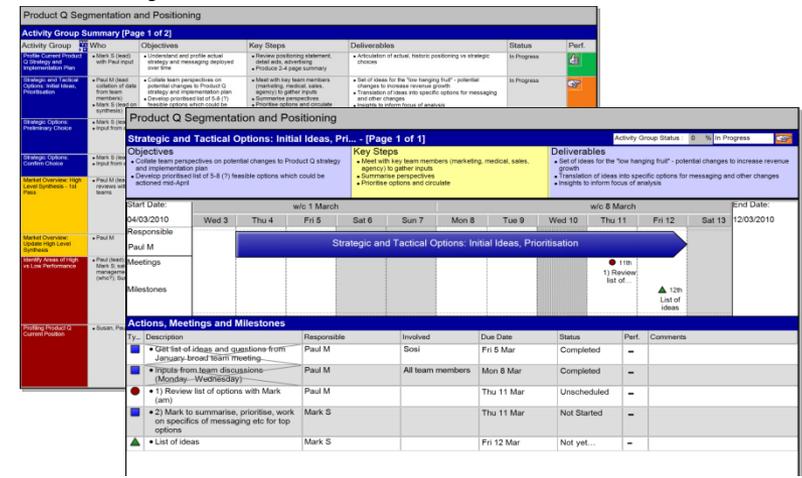
## Key Features (page 1 of 2)

- 8 different “views” that help separate the big picture from the detail
  - Flexible timeline display with clear graphics
  - Activity summaries
  - Detailed to-do lists
  - Issue Log, Contact List
- A focus on objectives, deliverables and measures of success and not just on activities and tasks
- Clear graphics that facilitate thinking, communication and reporting
- Highly intuitive interface offers outstanding ease-of-use
- Good inter-operability with typical software
  - One click export to PowerPoint or PDF
  - Export of lists / tables to Excel / CSV
  - Easy copy and paste to email, Word, Excel, PowerPoint etc..

### Flexible Timeline Display - Examples



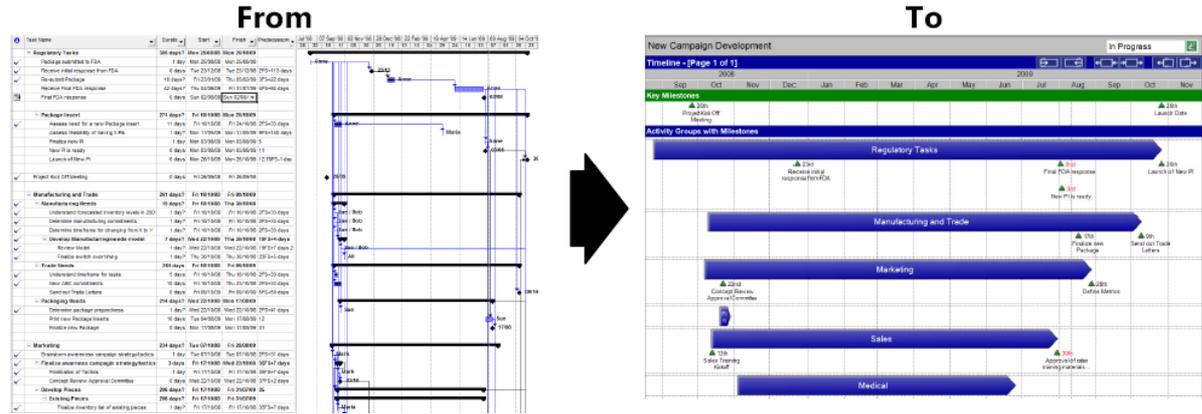
### Activity Summaries and To-Do Lists



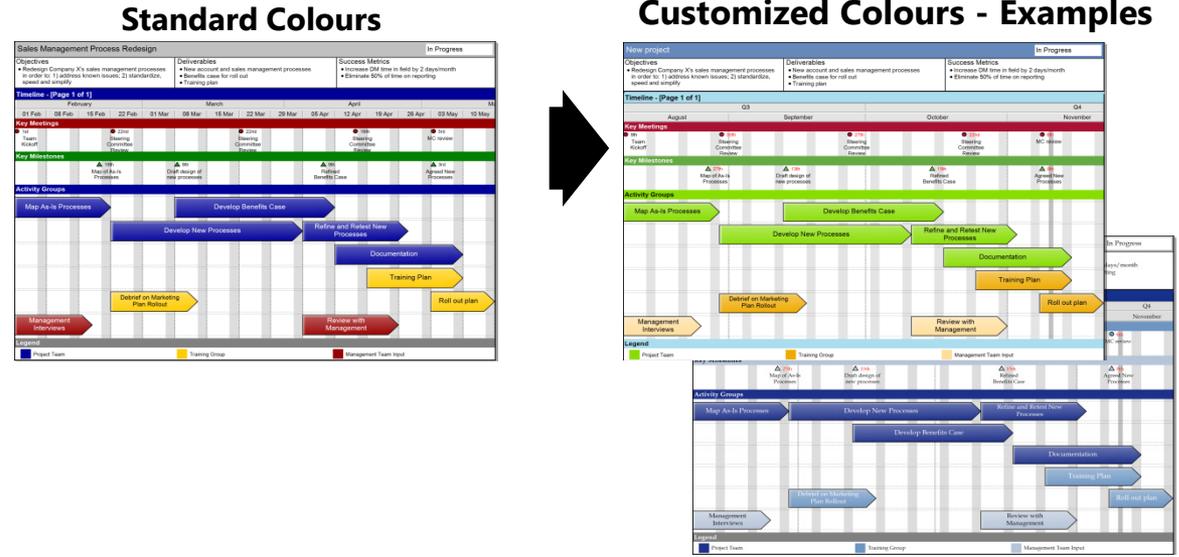
# Swiftlight

## Key Features (page 2 of 2)

- Easy links to / from Microsoft Project
  - E.g. send high level information from MS Project to Swiftlight for easier visualization and management communication



- Customization capability
  - Colours and fonts: align outputs with company or client branding
  - Key terminology
  - PowerPoint template (for export); logo



**Swiftlight's range of functionality and flexibility allows it to be used in a variety of different ways / at different levels of detail ....**

Three common ways of using Swiftlight:

1. Just for creating timelines
  
2. For high level project / portfolio planning
  
3. For in depth project management

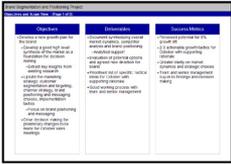
**Views Used - Illustrative**



**Timeline**



**Timeline**



**Objectives and Scope**



**Activity Group Summary**

**As above plus**



**Activity Group Detail**



**Action List over Time**

- +  
Contact List  
Action List  
Issue Log**

**...which means that, for consultants, Swiftlight has multiple potential uses (which will be explored further in this toolkit) and delivers multiple benefits.**

Usage	Who by	Benefits of Swiftlight
1. For proposals and client meetings: easy, fast creation of timelines and other outputs	Partner / principal / associate	<ul style="list-style-type: none"> <li>• Time savings</li> <li>• Professional outputs, consistency across organisation</li> <li>• Improved communication, client/team buy-in</li> <li>• Increased client engagement</li> </ul>
2. Real-time creation / editing of project plans during client meetings	Anyone	<ul style="list-style-type: none"> <li>• Increased client engagement</li> <li>• Time savings in planning</li> </ul>
3. Program office: for a management overview, or portfolio perspective across a number of projects / initiatives	Partner / principal / PMO teams	<ul style="list-style-type: none"> <li>• Easier visualisation and communication of plans and progress</li> <li>• Easier / improved management oversight</li> <li>• Time savings</li> </ul>
4. "Day-to-day"/ in-depth project management on an active engagement	Project leader (principal / associate)	<ul style="list-style-type: none"> <li>• Improved visualization and clarity for manager, for team, for client</li> <li>• Time savings vs other tools</li> </ul>
5. Structured planning for more junior team members	Associates / junior consultants	<ul style="list-style-type: none"> <li>• A structured approach to guide their thinking / assist in development of PM skills</li> <li>• Improved transparency and easier oversight</li> <li>• Standardised (high quality) outputs</li> </ul>
6. Leverage links to MS Project <ul style="list-style-type: none"> <li>• Extract high level information from MSP to facilitate executive reporting on complex projects</li> <li>• Undertake high level planning in Swiftlight and transfer to MSP for more detailed refinement</li> </ul>	Anyone	<ul style="list-style-type: none"> <li>• Improved communication / reporting to senior executives</li> <li>• Easier, faster "top-down" planning</li> <li>• Save time vs alternative of using Excel/PowerPoint</li> </ul>
7. Overseeing multiple projects	Partner / senior consultant	<ul style="list-style-type: none"> <li>• Keep things in perspective and stay on top</li> </ul>

# Swiftlight

## Overall Business Benefits - Summary

---

- Increased consultant productivity
  - Save time in the creation of key project outputs
- Improved client communication, engagement and buy-in
- A structure which fits the consulting process, and which can aid in the development of project management skills amongst junior consultants
- Consistent quality of outputs across the organisation
- Outputs that can easily be aligned with the consulting firm's or with client branding (i.e. colours, fonts etc)
- Outstanding ease-of-use => easy adoption
- Low risk, low investment, great value for money

- Introduction to Swiftlight
- Seven Uses of Swiftlight

### **1) Timelines (and other outputs) for proposals / meetings**

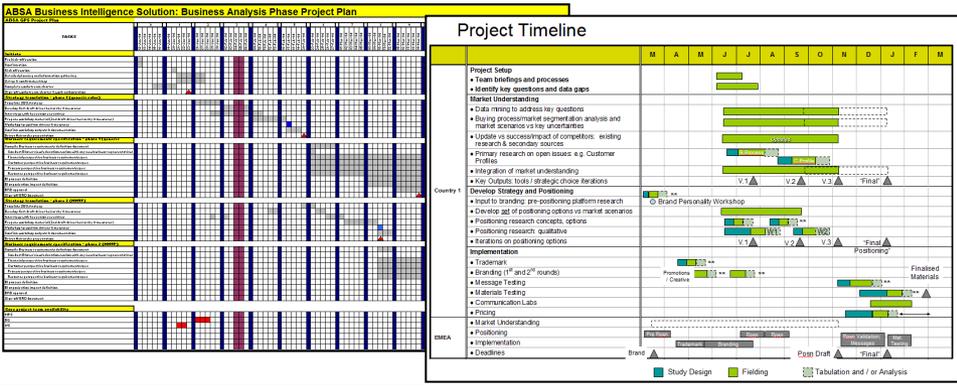
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# Use 1) - Timelines (and other outputs) for proposals / meetings

## Introduction

Swiftlight is a fantastic tool for creating great looking timelines (and other outputs) for your proposal documents and client meetings, **saving you hours of precious time** vs working in Excel and / or PowerPoint

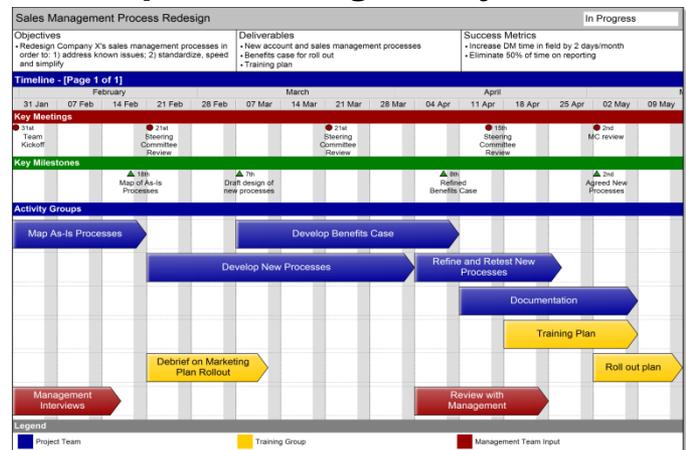
If you are currently creating project plans in Excel and/or PowerPoint, while this "works" it can be inefficient...



- You can do anything in Excel and PowerPoint, but: 1) it can be **incredibly** time consuming to create and update plans, and 2) the outputs may vary in style and quality from one consultant or project to another

Swiftlight, on the other hand, helps you create good looking, client-ready outputs in a fraction of the time

### Example "One Page" Project Plan



- Fast
- Flexible
- Customisable
- Links to / from MS Project if needed

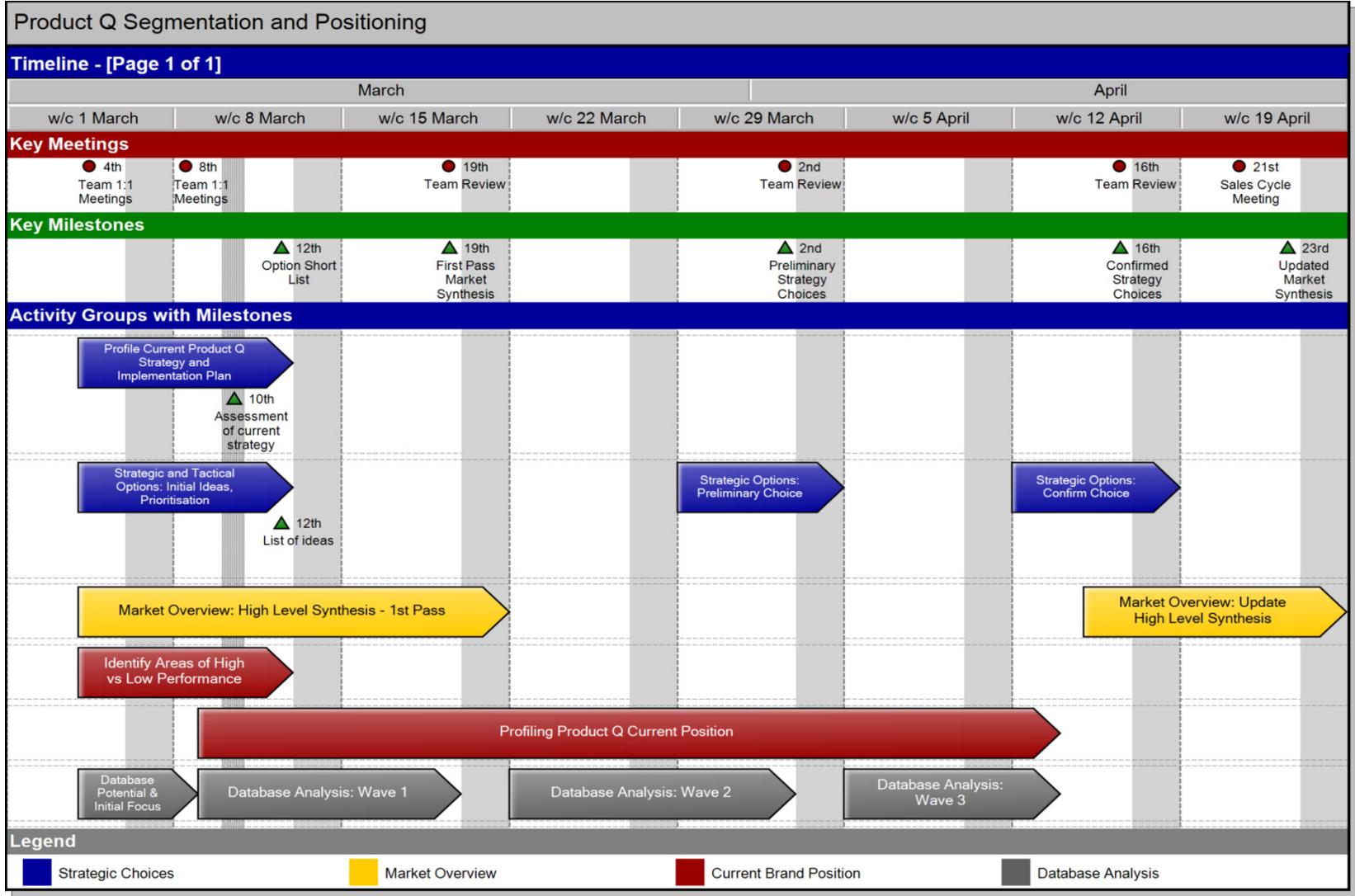
**Find out more:**

- See examples on the next few pages
- Download [example files](#) to use as templates
- Watch this video to see how you can [create a project timeline in minutes](#)



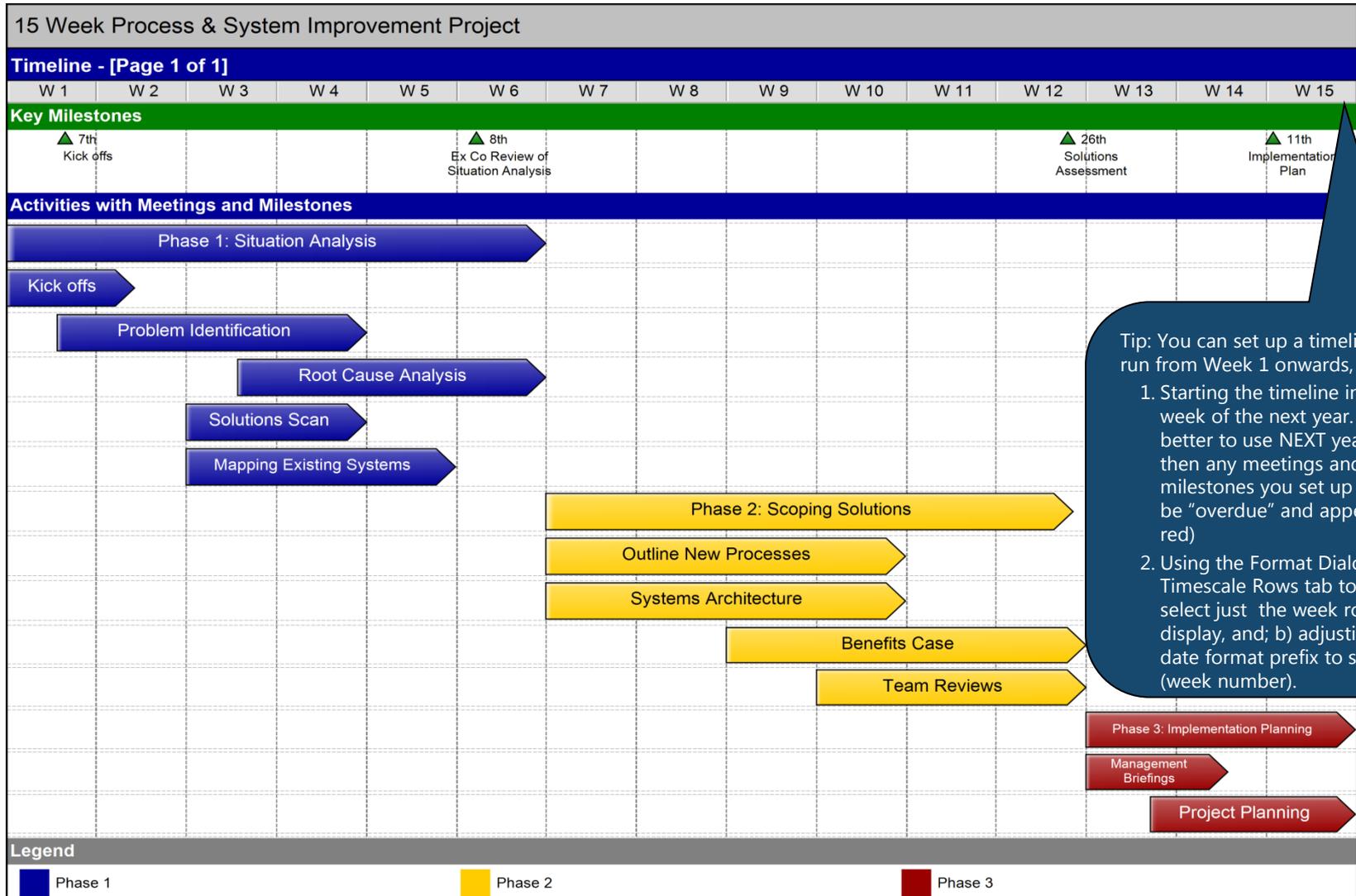
# Use 1) - Timelines (and other outputs) for proposals / meetings

## Example: A Two Month Product Review



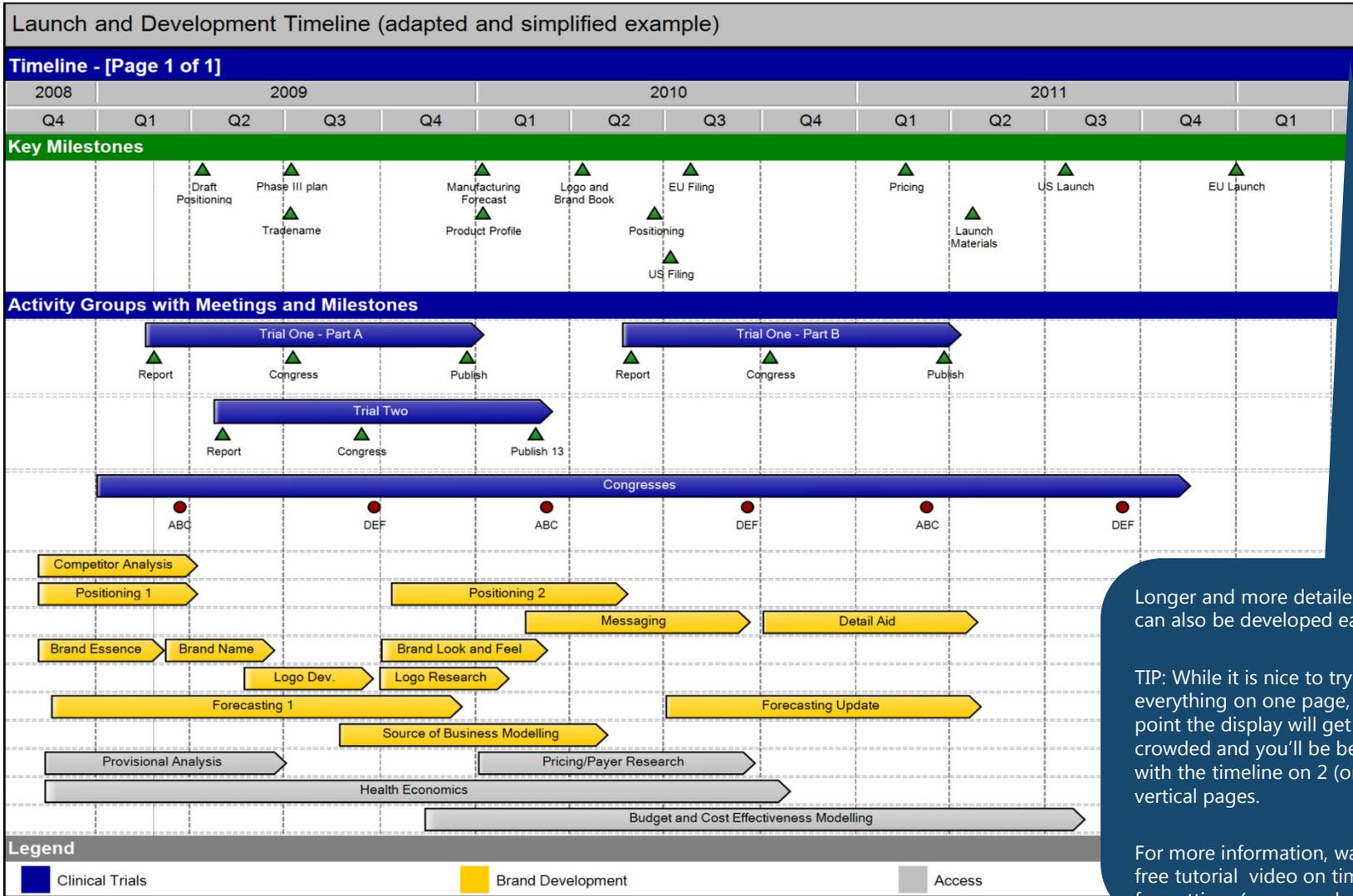
# Use 1) - Timelines (and other outputs) for proposals / meetings

## Example: 15 Week IT / Process Improvement



# Use 1) - Timelines (and other outputs) for proposals / meetings

## Example: 3 year Launch and Development Timeline (simplified)



Longer and more detailed timelines can also be developed easily.

TIP: While it is nice to try and keep everything on one page, at some point the display will get too crowded and you'll be better off with the timeline on 2 (or more) vertical pages.

For more information, watch the free tutorial video on timeline formatting (on our website).

# Use 1) - Timelines (and other outputs) for proposals / meetings

## Example: Objectives and Scope View

Product Q Segmentation and Positioning

**Objectives and Scope View**

Objectives	Deliverables	Success Metrics
<ul style="list-style-type: none"> <li>• Work in a collaborative way with the CLIENT team to:               <ul style="list-style-type: none"> <li>- 1) Develop a good high level synthesis of the market as a foundation for decision making</li> <li>- 2) Help the team to extract key insights from the market research</li> <li>- 3) Start to update the portfolio strategy (channel and customer segmentation, positioning and messaging choices, implementation tactics)</li> <li>- 4) Support decision making for preliminary changes to be made for April cycle meetings</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Document synthesizing overall market dynamics</li> <li>• Analytical support (direction, ideas, and arms and legs for analysis) to prioritise analyses of the market research, and pull out key findings</li> <li>• Prioritised list of specific, actionable ideas for April with supporting rationale</li> <li>• Provide analytical support and advice to help with decision making on messaging and other changes for April sales cycle meetings</li> <li>• Good working process with Client team</li> </ul>	<ul style="list-style-type: none"> <li>• CLIENT Team has greater clarity on market dynamics (market synthesis)</li> <li>• Greater clarity about strategic choices</li> <li>• Identification of 2-3 actionable ideas with supporting rationale for Product Q for April</li> <li>• Team buy-in to findings and decision making</li> </ul>

This summary page from the Objectives and Scope view is probably the most used output from this view as it can convey key project goals at a glance.

TIP 1: You can choose which categories of information get displayed using the format dialogue > View Settings tab. Select 2 or 3 from Objectives , Key Questions, Deliverables, Success Metrics, Budget, Comments.

TIP 2: You can also change the Terminology in your file using the menu: Tools > Options > Terminology tab. For example, you might change "Objectives" to "Goals".

# Use 1) - Timelines (and other outputs) for proposals / meetings

## Example: Activity Group Summary

Product Q Segmentation and Positioning				
Activity Group Summary				
Activity Group	Who	Objectives	Key Steps	Deliverables
Profile Current Product Q Strategy and Implementation Plan	• Mark S (lead) with Paul input	• Understand and profile actual strategy and messaging deployed over time	• Review positioning statement, detail aids, advertising • Produce 2-4 page summary	• Articulation of actual, historic positioning vs strategic choices
Strategic and Tactical Options: Initial Ideas, Prioritisation	• Paul M (lead collation of data from team members) • Mark S (lead on synthesis)	• Collate team perspectives on potential changes to Product Q strategy and implementation plan • Develop prioritised list of 5-8 (?) feasible options which could be actioned mid-April	• Meet with key team members (marketing, medical, sales, agency) to gather inputs • Summarise perspectives • Prioritise options and circulate	• Set of ideas for the "low hanging fruit" - potential changes to increase revenue growth • Translation of ideas into specific options for messaging and other changes • Insights to inform focus of analysis
Strategic Options: Preliminary Choice	• Mark S (lead) • Input from all	• Review options and make preliminary decision about which looks best for the portfolio	• Assess viability and impact of potential choices in light of market understanding • Team review, discussion, directional decision	• First evaluation of options • Preliminary strategic decisions for April
Strategic Options: Confirm Choice	• Mark S (lead) • Input from all	• Reach team consensus on initial changes in Product Q strategy and implementation plan	• Finalise assessment of options • Team review, discussion and decision making	• Clear direction for Sales Cycle Meetings
Market Overview: High Level Synthesis - 1st Pass	• Paul M (lead); reviews with teams	• Synthesize key market research and team knowledge into a clear market summary	• Read and review relevant market research materials • Develop summary document (15-30 pages) and circulate to team for review • Integrate insights from reviews and discussions with team members	• Summary document (~15-30 pages) focusing on: - High level patient flow / treatment algorithm across the 8 patient sectors, with qualitative view on differences between sector - Physician / hospital segmentation hypotheses and preliminary prioritisation - Patient segmentation hypotheses and preliminary prioritisation
Market Overview: Update High Level Synthesis	• Paul M	• Update summary document to reflect new insights	• Update synthesis document to reflect insights from analysis	• Updated summary document
Identify Areas of High vs Low Performance	• Paul (lead); Mark S; sales management (who?); Susan	• Find physician segments, hospital types / other actionable CUSTOMER types where Product Q is substantially higher than average (potential focus for further investigation) • Develop list of hypotheses on drivers of high/low performance and potential implications for strategy and implementation plan	• Discussion and (?) set up data gathering with sales • Discussion Susan and review MR data • Preliminary review database • Mark S - collate team perspectives	• Distribution profile of high vs low performing territories • Distribution profile of high vs low performing hospitals / physicians • Set of hypotheses on what is driving differences and implications for strategy
Profiling Product Q Current Position	• Susan, Paul	• Develop a high level and segmented perspective of Product Q's position in the market: a) where used in the Tx algorithm; b) brand perceptions and other drivers of brand choice • Understand areas of high vs low performance and insights for action • Identify and prioritise expansion opportunities	• Develop analytical plan and • Integrate findings from analytical database and other research basis	
Database Potential & Initial Focus	• Susan; Paul	• Identify how to maximise use of market research data over next 4-6 weeks	• Meeting with Susan to discuss cuts of data • Write up analysis plan	
Database Analysis: Wave 1	• Susan; Paul; agency	• List questions, hypotheses and run analyses	• TBD	

This view is providing some clarity about what is going on in each activity – which can be helpful either for internal planning or if a client needs more specificity in a proposal.

TIP: you can choose to display all or some of the Activities in the project. To hide an Activity, just select it, and then use the Right Click menu, > Hide, or use the Hide Short-Cut button on the toolbar.

Note: In this example, the terminology has been changed: Key Steps has replaced "Key Questions"

# Use 1) - Timelines (and other outputs) for proposals / meetings

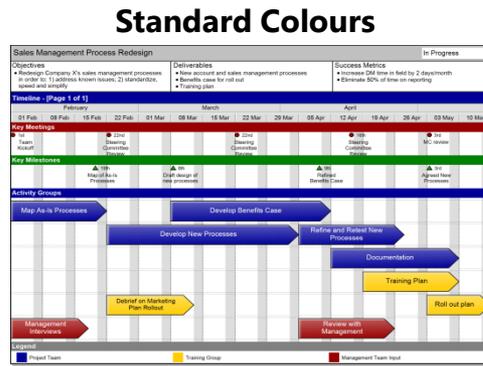
## Customization Capability

Many consultants and clients feel it is important that outputs look not only professional, but also consistent with their corporate branding. Fortunately, Swiftlight provides customization capabilities which allow you to change colours, fonts and more so that outputs can be completely aligned with branding guidelines.

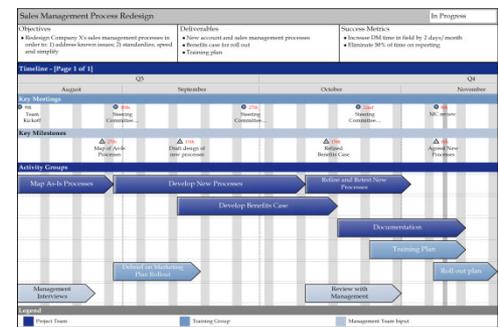
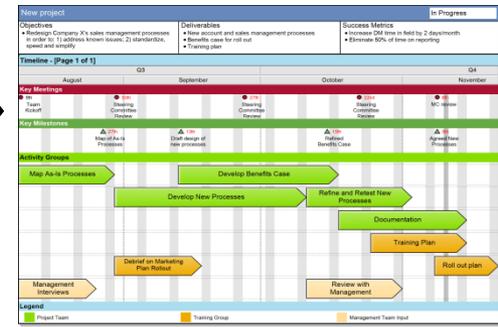
### Customization Capabilities: Illustration

- Customization capabilities include:

- Colours for:
  - Activities
  - The page header and dividing rows
  - Timescale rows
  - The legend
  - Meeting and milestone icons
- Fonts
- PowerPoint template (for export)
- Logo (on print, export)



### Customized Colours - Examples



**Find out more:**  
See page 52 of this toolkit for a quick introduction to how to customise colours and fonts

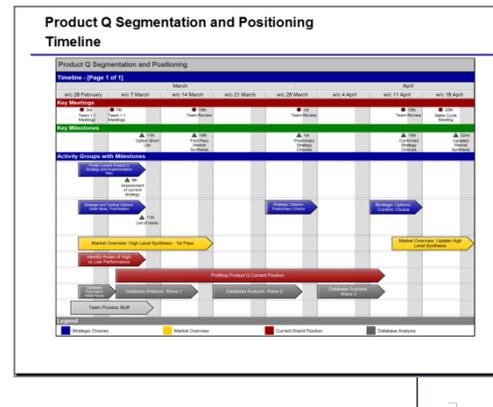
# Use 1) - Timelines (and other outputs) for proposals / meetings

## Summary

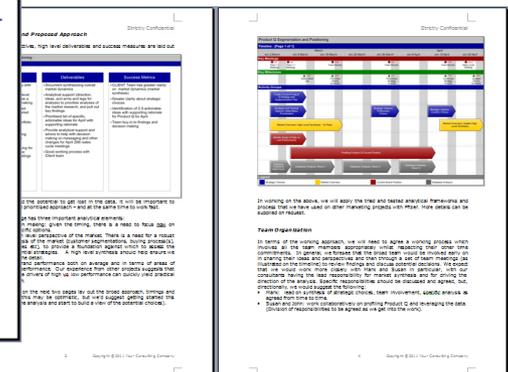
Whichever views you are using, Swiftlight can help you create outputs very quickly – typically saving hours over the alternatives, and giving you great looking materials which will enhance your proposal documents and your client discussions

- Swiftlight's outputs can easily be used in:
  - PowerPoint presentations
  - PDF documents
  - Proposal letters / documents where they will enhance / support the text

### In PowerPoint



### In proposal documents



### Usage

Proposal Easy, fast creation of timelines and other outputs for project proposals and client meetings

### Who by

Partner / principal / associate

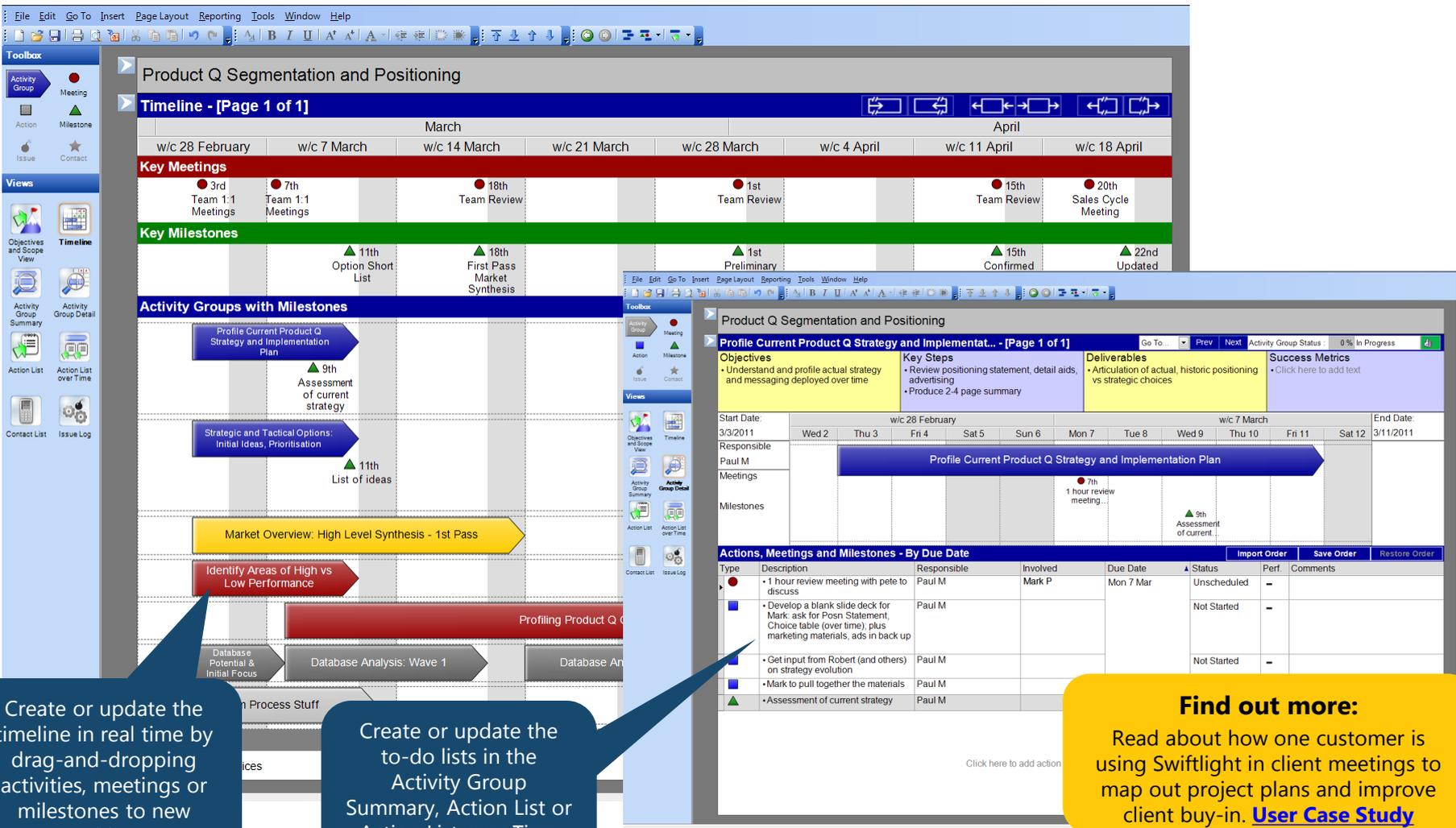
### Benefits of Swiftlight

- Time savings
- Professional looking outputs that are consistent across the organisation
- Improved communication, client/team buy-in
- Increased client engagement

- Introduction to Swiftlight
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# Use 2) - Real-time creation of project plans in client meetings

With Swiftlight's clear visuals and intuitive drag-and-drop interface, it is easy to project your Swiftlight file onto a screen and then to create or update a plan in real-time with a client or with the team – enhancing engagement and client / team buy-in



The screenshot displays the Swiftlight software interface for a project titled "Product Q Segmentation and Positioning". The main view is a Gantt-style timeline from February to April, showing key meetings (e.g., Team 1:1 Meetings, Team Review, Sales Cycle Meeting) and key milestones (e.g., Option Short List, First Pass Market Synthesis, Preliminary, Confirmed, Updated). Below the timeline, there are sections for "Activity Groups with Milestones" and "Actions, Meetings and Milestones - By Due Date".

**Activity Groups with Milestones:**

- Profile Current Product Q Strategy and Implementation Plan (Milestone: 9th Assessment of current strategy)
- Strategic and Tactical Options: Initial Ideas, Prioritisation (Milestone: 11th List of ideas)
- Market Overview: High Level Synthesis - 1st Pass
- Identify Areas of High vs Low Performance
- Profiling Product Q C
- Database Potential & Initial Focus
- Database Analysis: Wave 1
- Database An

**Actions, Meetings and Milestones - By Due Date:**

Type	Description	Responsible	Involved	Due Date	Status	Perf.	Comments
●	1 hour review meeting with pete to discuss	Paul M	Mark P	Mon 7 Mar	Unscheduled	-	
■	Develop a blank slide deck for Mark ask for Posn Statement, Choice table (over time), plus marketing materials, ads in back up	Paul M			Not Started	-	
■	Get input from Robert (and others) on strategy evolution	Paul M			Not Started	-	
■	Mark to pull together the materials	Paul M					
▲	Assessment of current strategy	Paul M					

Create or update the timeline in real time by drag-and-dropping activities, meetings or milestones to new positions

Create or update the to-do lists in the Activity Group Summary, Action List or Action List over Time views

**Find out more:**  
Read about how one customer is using Swiftlight in client meetings to map out project plans and improve client buy-in. [User Case Study](#)

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# Use 3) - Using Swiftlight in a Program Office

## Providing a high level perspectives on a portfolio of initiatives

*Program offices have diverse needs, but whatever the situation Swiftlight can be a valuable tool in a manager's arsenal, helping them visualize and communicate project or portfolio plans / progress more effectively, and saving them time in the process*

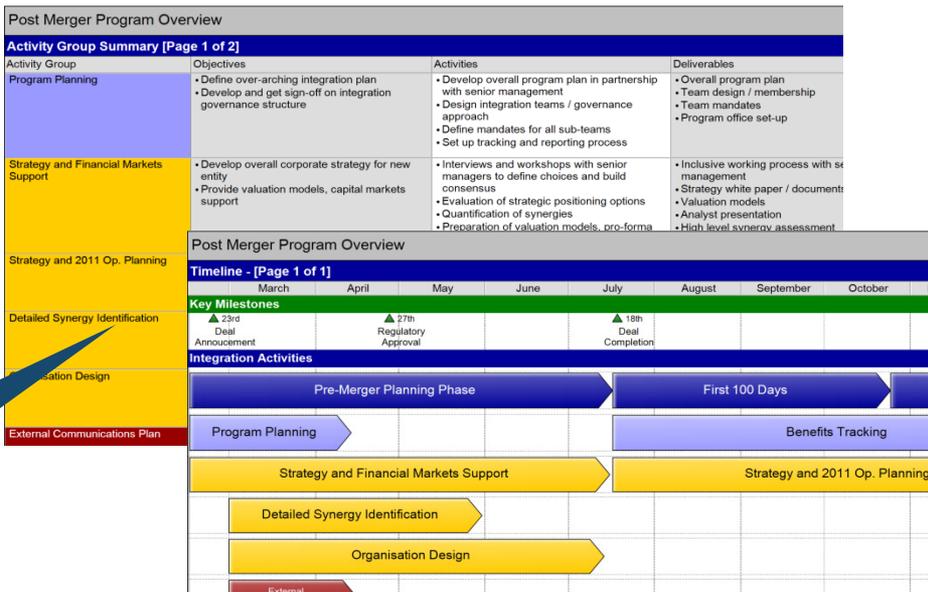
### Situation

- The goals, scope, scale and activities of program offices varies widely, but typically their role will include:
  - Developing and maintaining an integrated program plan
  - Collating status reports from different teams
  - Risk and issue management
  - Communicating plans and progress to teams and stakeholders
  
- Example issues faced today:
  - Timely and efficient collation of status reports from distributed teams
  - PowerPoint frequently used to create “presentable” / communicate-able plans for senior management
    - MS Project plans (if used) are widely seen as too detailed for senior audiences

### Uses and Benefits of Swiftlight

- A high level planning and communication / reporting tool for the program office and / or sub-teams
  - Project / team charters and progress reporting. E.g. Timelines, Activity Summaries
- Benefits:
  - Easier visualization and communication of plans and progress => improved oversight
  - Time savings vs alternatives

Illustrative outputs

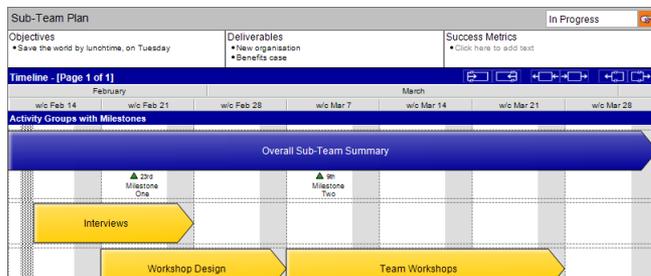


# Use 3) - Using Swiftlight in a Program Office Building and Maintaining a Program Plan

There are various ways to build and maintain a program plan in Swiftlight

## Creating the Initial Plan

- 1) Create a plan "top-down" in Swiftlight
  - Simply create a timeline / other outputs in Swiftlight
- 2) Create sub-plans in Swiftlight and build the master program plan by copy and pasting elements of the sub-plans into a master file
  - Note: a good way to do this is for each sub-team plan to have one summary Activity covering key milestones/other elements to be copied into the master plan



- 3) Create a master plan from sub-plans created in MS Project
  - Utilize the links between Swiftlight and MS Project
  - See next page for suggested process

## Maintaining the Plan

- Our recommendation is that once a master plan has been created, updates are made manually by the program owner, rather than by continually updating the plan by copy/paste or linking to MS Project (provided the plan is relatively high level):
  - Swiftlight's interface makes it easy / fast to update the timeline / other elements
  - Updating by copy/paste, while appealing in theory, is unlikely to save time and may reduce the understanding of changes that one gets from a manual plan update

A High Level Plan for the Program



Project / Team Sub-Plans



In Swiftlight, MS Project, Excel ....

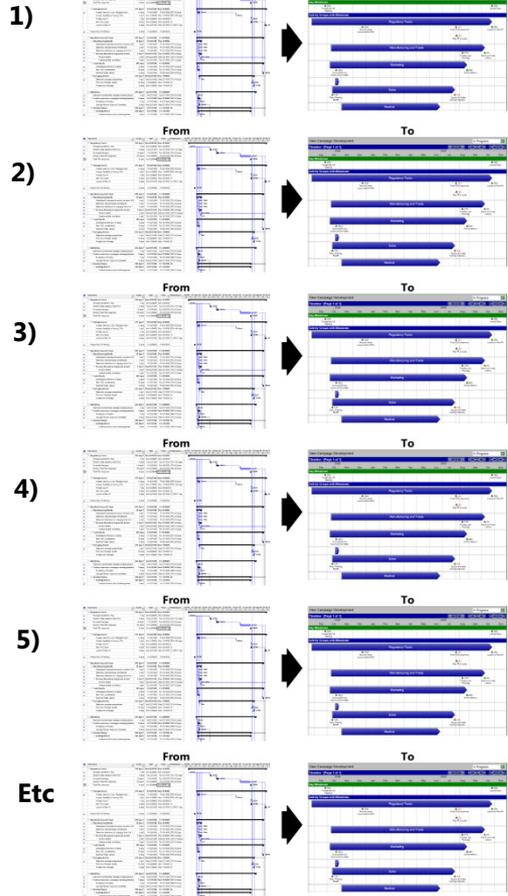
Keep aligned manually via team process

# Use 3) - Using Swiftlight in a Program Office

## Building a high level portfolio plan in Swiftlight from multiple MS Project files – suggested process

Step 1: convert all your MS Project files to Swiftlight files using the Swiftlight MS Project converter

- Select a level of hierarchy in the converter so that the right high level tasks (e.g. 3-6) come across as Activity Groups
- You may need to tweak your MS Project file hierarchy to get the right tasks / milestones coming across

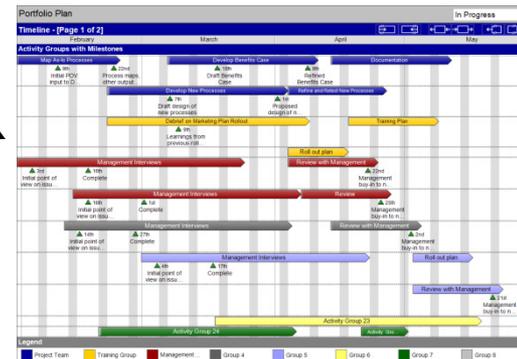


Step 2: create a master Swiftlight file by copy and pasting the Activities from each Swiftlight file into one master portfolio file

- Select and rename one file as your “portfolio file”
- Remove the key milestones section (if appropriate)
- Increase the number of rows available for Activities by using the Format Dialogue > Activity Group Rows tab to: 1) increase the number of rows overall and for page one; 2) reduce the minimum height of Activity Group Rows to allow more rows per page;
- Also reduce the minimum height of Activity Group Rows on the Timeline (Interlaced Mode) Format tab – to allow more rows per page in interlaced mode
- Ensure the duration (width) of the timeline will be long enough for you to see the activities from all the files (Use Format dialogue > Date Range or the short cut keys)
- Go to the next Swiftlight file (e.g. 2) (open in a separate window) and select all the activities by click, hold and drag (similar to PowerPoint), or by selecting them one by one. CNTL C to copy
- Go back to your master file, place the cursor in the first available row and CNTL V to paste
- Change the colours of the new activities (if desired), and move activities to the right rows (if needed)
- Save the file
- Repeat copy and paste process for next Swiftlight files (e.g. 3,4 etc)
- Note: any milestones at the “Key Milestone” level on a project, should probably be assigned to an Activity before copying across – otherwise your Key Milestone row will become mix of milestones from various projects.

Step 3: tidy up

- Timeline: adjust the heights of Activity Rows; the width / height of milestones; the minimum and maximum text size to optimise display
- Activity Group Summary: select which columns to display; change display so that activities have the same colour as on the timeline (if desired), using Format Dialogue > Columns tab



- Introduction to Swiftlight
- Seven Uses of Swiftlight
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  - 4) In depth project management of an active engagement**
  - 5) Structured planning for junior team members
  - 6) Leveraging the links between Swiftlight and MS Project
  - 7) Partner perspective: overseeing multiple projects
- Tips
  - Changing terminology in Swiftlight
  - Adapting colours / fonts to create a customized file
  - Other
- Links to example files

## Use 4) - In-depth project management of an active engagement

### Introduction

*The approach you take to a creating and maintaining a project plan will vary by situation and should be closely aligned with the way that you want to direct and manage the people on the team.*

### How to Approach the Project Plan

- The way you want to tackle project planning will be influenced by a range of factors including:
  - Your level of experience on the project
  - The experience of the team members
  - Likelihood of changes in the project plan
  - Size, location of team
  - Your planned management style
- In broad terms, there are two approaches to the team and the plan:
  - 1) **“Delegated / high level”**: where the team is managed to a high level timeline and deliverables.
    - With this approach the project leader is likely to focus on a high level plan for the project without detailed visibility of all team members to-do lists
  - 2) **“In-depth / command and control”**: where all of the project to-dos are scoped out, listed and managed either by the team leader or by the team-leader in conjunction with team members
- In our experience, projects often fall somewhere in the middle, where some team members / parts of the project need to be planned in detail and / or micro-managed whilst others can be more effectively delegated.
- What is most important though, is to make a conscious choice about **how / in how much detail** you want to manage different team members / parts of the project.

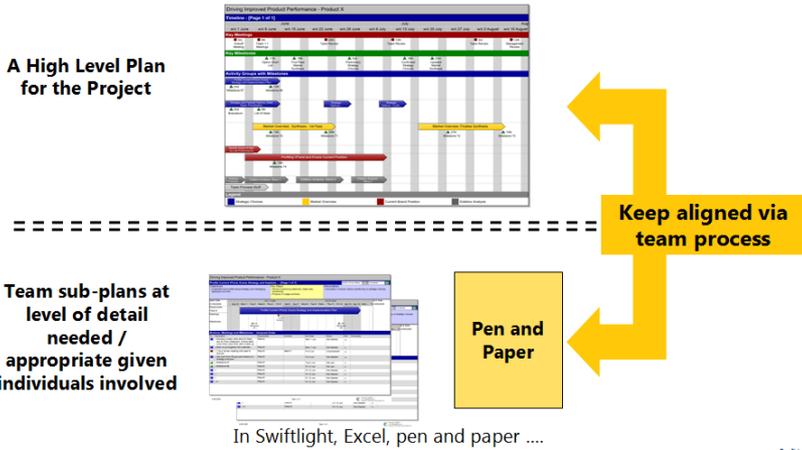
# Use 4) - In-depth project management of an active engagement

## Introduction

Whatever approach you take to managing the team and creating and maintaining your project plan, Swiftlight should be able to help.

### Using Swiftlight

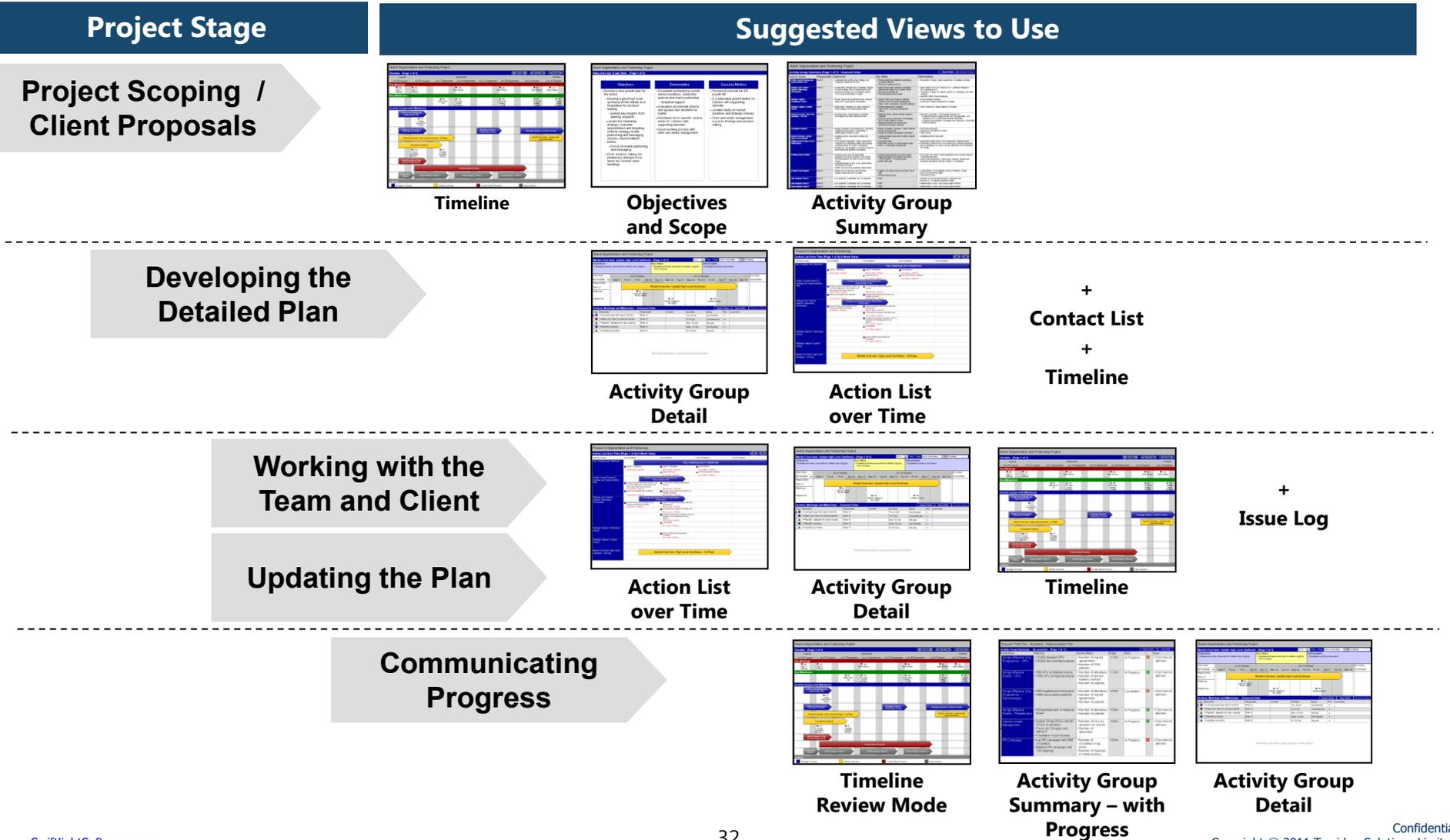
- Whatever approach you take, we recommend that you use Swiftlight to develop and maintain a high level plan for the project.
  - E.g. Project and activity goals and deliverables, a timeline for activities, with milestones and ~2-8 key steps per activity
- Under the “delegated” approach, the team leader can then manage to this high level plan, whilst managing the team at the level of detail appropriate to their experience / the project needs
- With the “in-depth” approach you could either have more detail in one overall master-plan, or (our preferred approach) more detail in separate team sub-plans



Note: we recognize that plan needs vary widely by project, and that in some situations you do need an all-encompassing plan in one document, with everything in it and with different people updating different parts of it. In these situations, Swiftlight is probably not the right tool for the in-depth plan – though it should still be useful for maintaining a high level plan. In general though, we believe that many, perhaps most, projects don’t need this kind of all encompassing plan and are better driven forward by a clear-sighted project leader and project team, with a good high level plan and sound team process.

# Use 4) - In-depth project management of an active engagement Using Swiftlight's different views at different times

Whether managing a high level or a more in depth plan, you will find that different Swiftlight views are useful at different stages of the project process



## Use 4) - In-depth project management of an active engagement

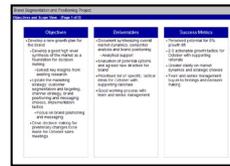
### Project scoping, proposals / kick-off meetings

Early on in a project, Swiftlight's three "big picture" views are particularly useful in initial project scoping and planning

#### Project Scoping / Client Proposals



Timeline



Objectives and Scope



Activity Group Summary

The Timeline can provide a high level perspective of project objectives and deliverables (et al), and a road map of activities and milestones

The Objectives and Scope view allows you to get into more detail on objectives, deliverables, measures of success et al, and can be a useful output for proposals and project charters.

The Activity Group Summary allows you to drill into the detail of the objectives, deliverables, key steps et al for each activity when this is needed for project scoping, proposals etc

**Top Tip:** you can change the terminology in Swiftlight to align it with your needs using the menus: Tools>Options>Terminology (e.g. change "Key Questions" to "Key Steps")

#### Find out more:

See examples in the "Timelines (and other outputs) for proposals / meetings" section of this toolkit.

# Use 4) - In-depth project management of an active engagement

## Adding detail to the project plan

Use the Activity Group Detail and Action List over Time views to create the detailed "to-do list" for each activity (the "who has to do what, by when")

### Developing the Detailed Plan



Activity Group Detail



Action List over Time

+  
Contact List  
+  
Timeline

For each Activity, list out the key actions and assign deadlines and responsibilities. It is good practice to have 1 or 2 milestones per activity to highlight when deliverables fall due, and the key check points.

The Action List over Time provides a perspective across all the Activities and is particularly useful for checking whether the key actions are in place and for reviewing what needs to get done in the next 1-4 weeks.

**Top Tip:** set up a list of the people involved in the project in the Contacts view before you start adding actions – this list will then be available in the drop-down lists when you want to assign responsibilities.

# Use 4) - In-depth project management of an active engagement

## Adding detail to the project plan

### Example Output - Activity Group Detail

**Product Q Segmentation and Positioning**

**Strategic and Tactical Options: Initial Ideas, Pri... - [Page 1 of 1]** Activity Group Status : 0 % In Progress

<b>Objectives</b> <ul style="list-style-type: none"> <li>Collate team perspectives on potential changes to Product Q strategy and implementation plan</li> <li>Develop prioritised list of 5-8 (?) feasible options which could be actioned mid-April</li> </ul>	<b>Key Steps</b> <ul style="list-style-type: none"> <li>Meet with key team members (marketing, medical, sales, agency) to gather inputs</li> <li>Summarise perspectives</li> <li>Prioritise options and circulate</li> </ul>	<b>Deliverables</b> <ul style="list-style-type: none"> <li>Set of ideas for the "low hanging fruit" - potential changes to increase revenue growth</li> <li>Translation of ideas into specific options for messaging and other changes</li> <li>Insights to inform focus of analysis</li> </ul>
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Start Date:	w/c 1 March	w/c 8 March	End Date:
04/03/2010	Wed 3	Thu 4	Fri 5
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# Use 4) - In-depth project management of an active engagement

## Keeping the plan up to date

When reviewing or updating the plan, the Action List over Time, the Activity Group Detail and the Timeline are the key views to use

**Working with the Team and Client**

**Updating the Plan**



**Action List over Time**

**Activity Group Detail**

**Timeline**

+  
**Issue Log**

The Action List over Time is probably the best place to review what should be getting done and to make updates to the to-do list.

The Activity Group Detail is a good alternative to using the Action List over Time for updating the plan - especially when reviewing progress with team members who may only be working on 1 or 2 activities.

The Timeline view is the best place to shift the dates of activities, add new ones and make "high level" changes to the plan.

**Top Tip:** to get a good perspective on upcoming deadlines, look at the Timeline in interlaced mode showing Activities and their Milestones

# Use 4) - In-depth project management of an active engagement

## Keeping the plan up to date

### Example Output - Action List over Time



Product Q Segmentation and Positioning				
Action List Over Time [Page 1 of 6]				
Activity Group	w/c 1 March	w/c 8 March	w/c 15 March	w/c 22 March
Key meetings and milestones	Key meetings and milestones			
	● Team 1:1 Meetings (Thu 04 Mar) - (Paul M)	● Team 1:1 Meetings (Mon 08 Mar) - (Paul M) ▲ Option Short List (Fri 12 Mar) - (Paul M)	● Team Review (Fri 19 Mar) - (Paul M) ▲ First Pass Market Synthesis (Fri 19 Mar) - (Paul M)	
Profile Current Product Q Strategy and Implementation Plan	Profile Current Product Q Strategy and Implementation Plan			
	■ Develop a blank slide deck for Mark: ask for Posn-Statement, Choice table (over time); plus DAid, ads in back up (Thu 04 Mar) - (Paul M)	● 1-hour review meeting with pete to discuss (Mon 08 Mar) - (Paul M)		
	■ Mark to pull together the materials (Thu 04 Mar) - (Paul M)	■ Get input from Robert (and others) on strategy evolution (Mon 08 Mar) - (Paul M) ▲ Assessment of current strategy (Wed 10 Mar) - (Paul M)		
Strategic and Tactical Options: Initial Ideas, Prioritisation	Strategic and Tactical Options: Initial Ideas, Prioritisation			
	■ Get list of ideas and questions from January broad team meeting (Fri 05 Mar) - (Paul M)	■ inputs from team discussions (Monday - Wednesday) (Mon 08 Mar) - (Paul M) ● 1) Review list of options with Mark (am) (Thu 11 Mar) - (Paul M) ■ 2) Mark to summarise, prioritise, work on specifics of messaging etc for top options (Thu 11 Mar) - (Mark S) ▲ List of ideas (Fri 12 Mar) - (Mark S)		
Strategic Options: Preliminary Choice		● Review options and prepare for circulation (Fri 12 Mar) - (Mark S)		
Strategic Options: Confirm Choice				
Market Overview: High Level Synthesis - 1st Pass	Market Overview: High Level Synthesis - 1st Pass			

The action list over time provides a perspective on what needs to get done over the next few weeks (or days) by showing by activity all the actions, meetings, milestones in the project.

It is a great view for reviewing and updating the plan and for working with the team. It is easy to cross things out when they are done (select, CTRL enter); add new items (by drag and drop from the toolbox), or to move items from one column to another if they are delayed.

# Use 4) - In-depth project management of an active engagement

## Communicating progress

Swiftlight's "big picture" views are generally the best ones to use when communicating progress

### Communicating Progress



**Timeline Review Mode**



**Activity Group Summary – with Progress**



**Activity Group Detail**

The Timeline view has a review mode which allows you to look at "where you are, relative to where you should be" – and is useful for providing a high level perspective to senior audiences

The Activity Group Summary allows you to communicate the status of relevant activities using traffic light (Red, Amber, Green) signals to highlight the performance / state of each activity

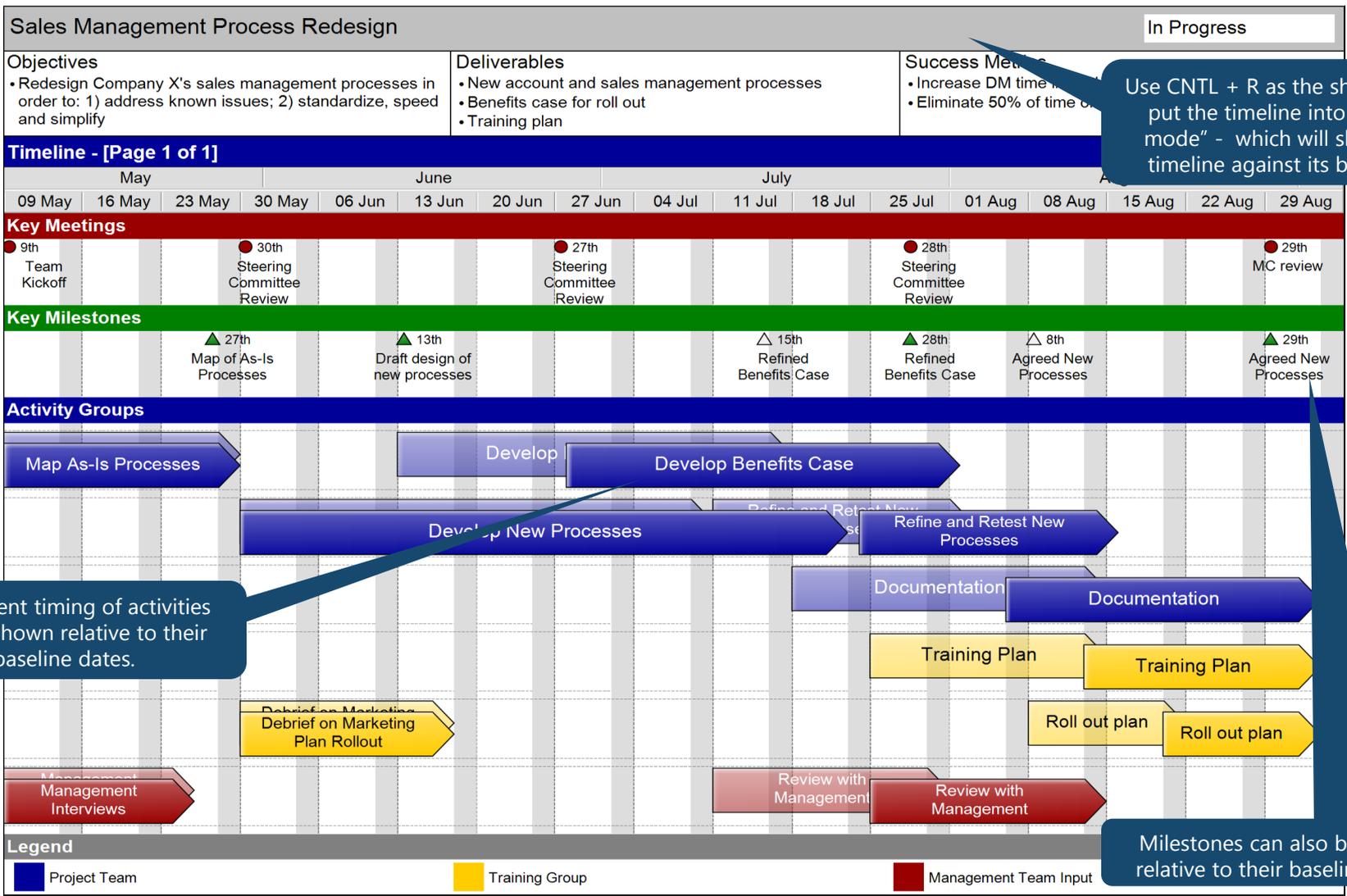
The Activity Group Detail view can provide a drill-in on the status of individual activities and their "to-do lists", when this level of detailed review is needed.

**Top Tip:** set up the Activity Group Summary to display what you need by changing the columns displayed using the "columns" tab of the format dialogue, and hiding activities you don't need to show by selecting and hiding them using the "right click" menu.

# Use 4) - In-depth project management of an active engagement

## Communicating progress

### Example Output – Timeline in Review Mode



Use CNTL + R as the short cut to put the timeline into 'review mode' - which will show the timeline against its baseline.

The current timing of activities can be shown relative to their baseline dates.

Milestones can also be shown relative to their baseline dates.

# Use 4) - In-depth project management of an active engagement

## Communicating progress

### Example Output – Activity Group Summary



Product Q Segmentation and Positioning							
Activity Group Summary [Page 1 of 3]							
Activity Group	Who	Objectives	Key Steps	Deliverables	Status	Perf.	Comments
Profile Current Product Q Strategy and Implementation Plan	• Mark S (lead) with Paul input	• Understand and profile actual strategy and messaging deployed over time	• Review positioning statement, detail aids, advertising • Produce 2-4 page summary	• Articulation of actual, historic positioning vs strategic choices	In Progress		• No issues
Strategic and Tactical Options: Initial Ideas, Prioritisation	• Paul M (lead collation of data from team members) • Mark S (lead on synthesis)	• Collate team perspectives on potential changes to Product Q strategy and implementation plan • Develop prioritised list of 5-8 (?) feasible options which could be actioned mid-April	• Meet with key team members (marketing, medical, sales, agency) to gather inputs • Summarise perspectives • Prioritise options and circulate	• Set of ideas for the "low hanging fruit" - potential changes to increase revenue growth • Translation of ideas into specific options for messaging and other changes • Insights to inform focus of analysis	In Progress		• Disagreement in team on "what's possible" • Need management input on what's in and out of scope, potential budget for funding changes
Strategic Options: Preliminary Choice	• Mark S (lead) • Input from all	• Review options and make preliminary decision about which looks best for the portfolio	• Assess viability and impact of potential choices in light of market understanding • Team review, discussion, directional decision	• First evaluation of options • Preliminary strategic decisions for April	In Progress		• Divergent views in team • Developing criteria to inform choice
Strategic Options: Confirm Choice	• Mark S (lead) • Input from all	• Reach team consensus on initial changes in Product Q strategy and implementation plan	• Finalise assessment of options • Team review, discussion and decision making	• Clear direction for Sales Cycle Meetings	Not Started	-	
Market Overview: High Level Synthesis - 1st Pass	• Paul M (lead); review with teams	• Synthesize key market research and team knowledge into a clear market summary	• Read and review relevant market research materials • Develop summary document (15-30 pages) and circulate to team for review • Integrate insights from discussions	• Summary document (~15-30 pages) focusing on: - High level patient flow / treatment algorithm across the patient sectors, with qualitative view on differences between sector - Physician / hospital segmentation hypotheses and preliminary prioritisation ...	Not Started	-	

If you don't need to show an activity in your output, you can select it in Swiftlight, then right click and 'Hide'.

Select the relevant columns to display using the page body format dialogue. In this case, columns to help report on status, performance (traffic light) have been selected, as well as "comments" to capture key points on status.

# Use 4) - In-depth project management of an active engagement

## Summary

*We hope these suggestions give you some ideas about how to use Swiftlight at different stages of a project and about how this can benefit you.*

- The approach you take to a creating and maintaining a workplan for a project will vary by situation and should be closely aligned with how you want to direct and manage the people on the team.
- Whatever approach you take, we recommend that you use Swiftlight to develop and maintain a high level plan for the project:
  - Under a “delegated” management approach, the team leader can then manage to this high level plan, whilst managing the team at the level of detail appropriate to their experience / the project needs
  - With a more “in-depth” approach you can either have more detail in one overall master-plan, or (our preferred approach) more detail in separate team sub-plans
- You will find that different Swiftlight views are useful at different stages of the project (see slide z)
- Overall, you should find that Swiftlight’s combination of “big-picture” and more detailed views, helps you plan and manage at a level that makes sense for your project, and in a way that is easy and fast

Usage	Who by	Benefits of Swiftlight
“Day-to-day”/ in-depth project management on an active engagement	Project leader (principal / associate) Team members	<ul style="list-style-type: none"> <li>• Improved visualization and clarity for project manager, for team, for client</li> <li>• Time savings vs other tools</li> </ul>

- Introduction to Swiftlight
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  - 4) In depth project management of an active engagement
  - 5) Structured planning for junior team members**
  - 6) Leveraging the links between Swiftlight and MS Project
  - 7) Partner perspective: overseeing multiple projects
- Tips
  - Changing terminology in Swiftlight
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- Links to example files

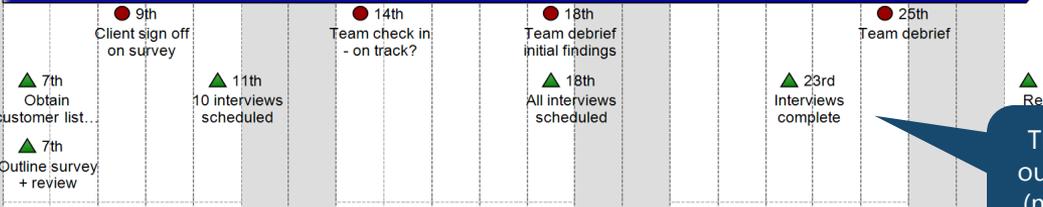
# Use 5) - Structured Planning for Junior Team Members

*If / when junior team members need to develop work plans, Swiftlight can help by providing them with a practical structure that helps them plan effectively, and that facilitates management oversight...*

## Example: Using the Activity Group Detail view to structure and plan an activity

**Customer Interviews - [Page 1 of 2]**
Activity Group Status : 0 % Not Started

<b>Objectives</b> • Interview 30 customers by phone to sanity check client and competitor strengths and weaknesses	<b>Key Questions</b> • What are client's strengths, weaknesses, opportunities to improve from a customer perspective? • Client vs competitor relative positioning	<b>Deliverables</b> • Summary notes on each interview • 8 page summary (PowerPoint slides)	<b>Success Metrics</b> • Client agrees customer list and methodology • On time
---	---	--	--

Start Date:	2/7/2011
Responsible	Consultant One
Meetings	
Milestones	

Actions, Meetings and Milestones						
Typ	Sub-activity	Description	Responsible	Involved	Due Date	Status
▲	Recruitment	• Obtain customer list; discuss criteria with client	Consultant One	Client - Bob; Sue	Mon Feb 7	Not yet achieved
■	Recruitment	• Select 60 potential targets (range of size, locations)	Consultant One	Project lead	Tue Feb 8	Not Started
■	Recruitment	• Start phoning customers to schedule 30 min discussions	Consultant One		Wed Feb 9	Not Started
▲	Recruitment	• 10 interviews scheduled	Consultant One		Fri Feb 11	Not yet
▲	Recruitment	• All interviews scheduled	Consultant One		Fri Feb 18	Not yet
■	Survey design	• Get survey outlines from past projects	Consultant One		Mon Feb 7	Not Sta
■	Survey design	• Map strategic questions to survey	Consultant One		Mon Feb 7	Not Sta
▲	Survey design	• Outline survey + review	Consultant One		Mon Feb 7	Not yet
■	Survey design	• Internal survey test: time, content, flow	Consultant One		Tue Feb 8	Not Started
●	Survey design	• Client sign off on survey	Consultant One		Wed Feb 9	Unscheduled

The top section encourages clarity about the objectives and desired outcomes from the activity.

The timeline highlights both content outputs (deliverables) and the process (meetings) through which the activity will be driven forward.

The lower section has the to-do list: who has to do what by when... (Note: list can be sorted by due date, any column header, or placed in a user-defined order)

# Use 5) - Structured Planning for Junior Team Members

..and for more micro-management the Action List over Time provides a perspective on tasks by day or by week..

## Using the Action List over Time to highlight what should be done each day.....

Structured Planning for Junior Team Members						Not Started	-
Action List Over Time [Page 1 of 12]							
Activity Group	Mon February 7	Tue February 8	Wed February 9	Thu February 10	Fri February 11		
Key meetings and milestones	Key meetings and milestones						
Customer Interviews	Customer Interviews						
	▲ Obtain customer list; discuss criteria with client (Consultant One)	■ Internal survey test: time, content, flow (Consultant One)	● Client sign off on survey (Consultant One)	■ Revisions, testing (Consultant One)	▲ 10 interviews scheduled (Consultant One)		
	▲ Outline survey + review (Consultant One)	■ Select 60 potential targets (range of size, locations) (Consultant One)	■ Start phoning customers to schedule 30 min discussions (Consultant One)		■ First 3 interviews? (Consultant One)		
	■ Get survey outlines from past projects (Consultant One)						
	■ Map strategic questions to survey (Consultant One)						

Action List over Time set up to show one week to a page, and actions, meetings and milestones for each day

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### **6) Leveraging the links between Swiftlight and MS Project**

- 7) Partner perspective: overseeing multiple projects
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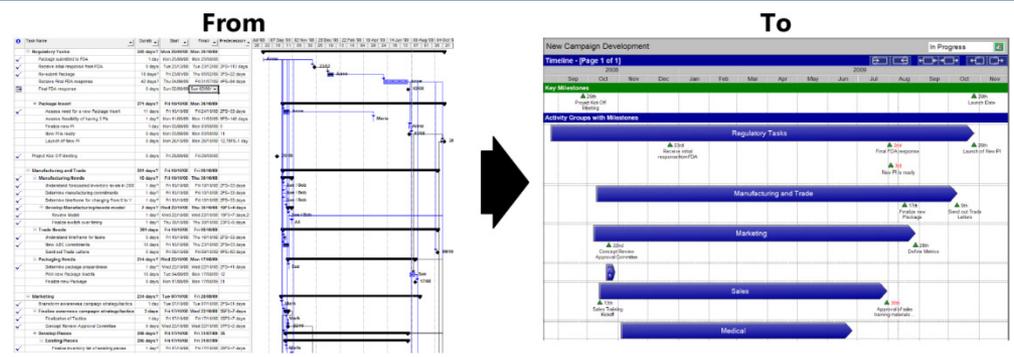
# Use 6) - Leveraging the links between Swiftlight and MS Project

If you are working on more complex projects where you need the capabilities of MS Project, or working in a program office or client environment where others are using it, you may find the links between Swiftlight and MS Project to be useful. These links allow you to:

## 1) Quickly convert a MS Project file into Swiftlight

## Benefits

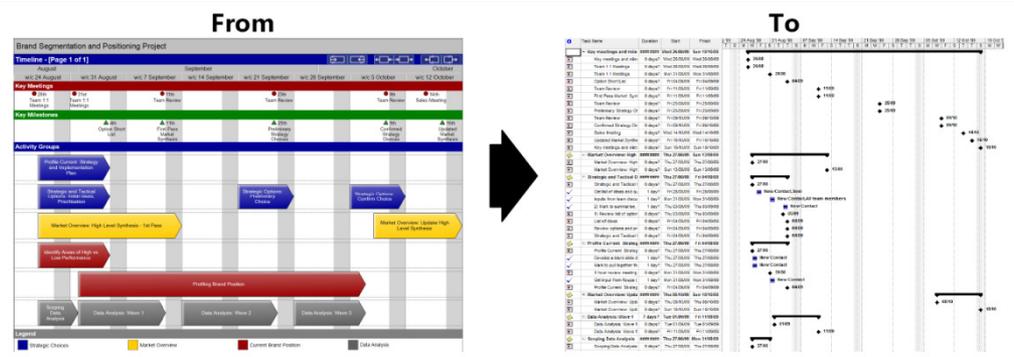
- Easier and clearer visualisation of MS Project plans for project communication / reporting to senior executives or other stakeholders
- Conversion of existing projects into Swiftlight for easier ongoing management



## 2) Take a plan in Swiftlight and convert it into a MS Project file

## Benefits

- Undertake "top down" / high level planning in Swiftlight and then transfer to MS Project for more detailed scheduling and refinement when needed



*" These links act as a bridge between the complex planning world of MS Project, and the higher level perspectives that senior management need and that Swiftlight can provide"*

**Find out more:**

- Read an [overview](#)
- Watch a "how to use the links" [video](#)

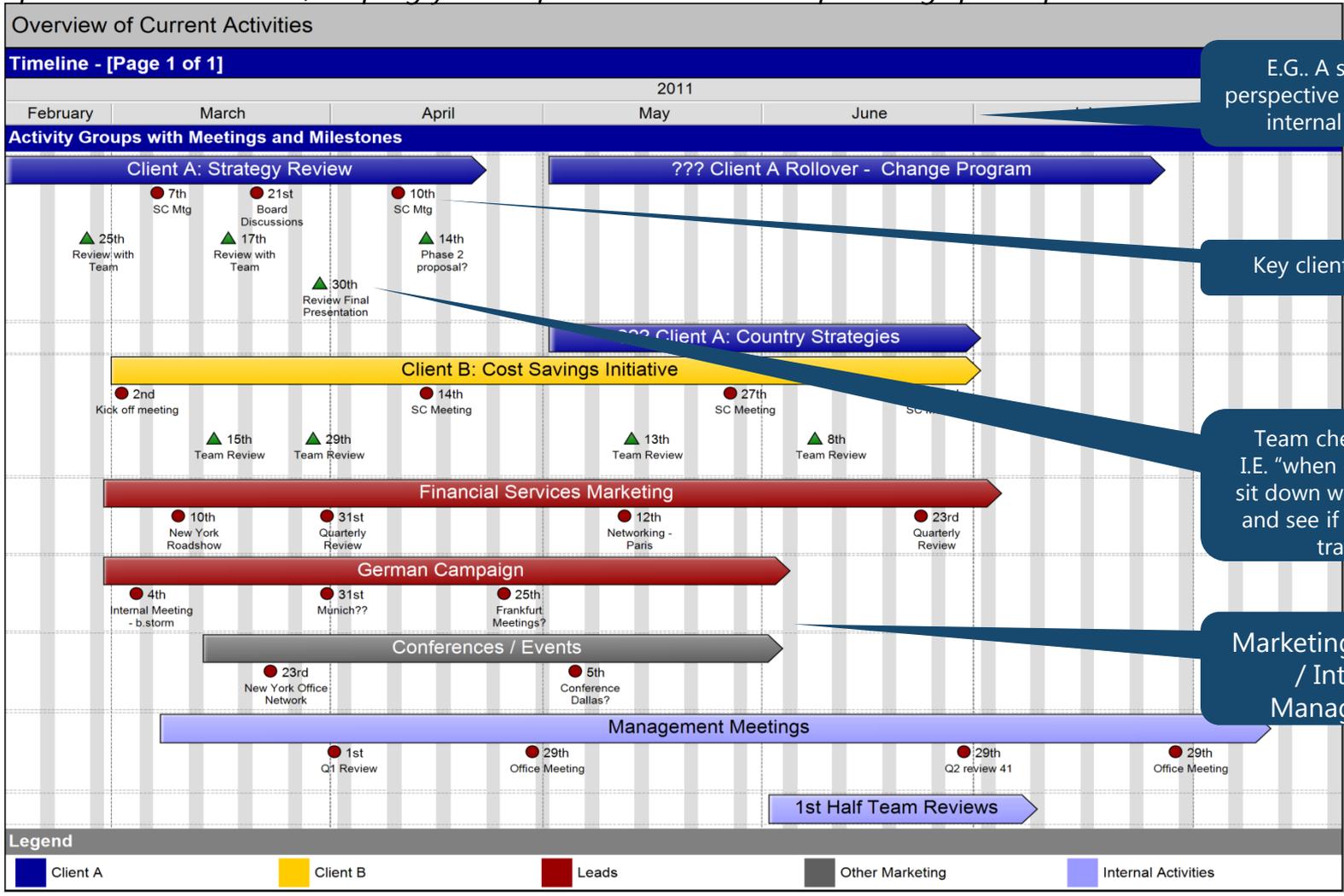
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### **7) Partner perspective: overseeing multiple projects**

- Tips
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# Use 7) - Partner perspective: overseeing multiple projects

For a senior consultant, who might be working on multiple initiatives, it can be hard to keep on top of all the deadlines and plan ahead. Swiftlight can help by providing high level perspectives of key client meetings and "check in" points with the team, helping you keep on track and see upcoming "pinch points" ...



E.G.. A six month perspective on client and internal activities

Key client meetings

Team check points. I.E. "when do I need to sit down with the team and see if they are on track?"

Marketing Activities / Internal Management

# Use 7) - Partner perspective: overseeing multiple projects

...and it's easy to drill in to look at a shorter timeline, or to use the Action List over Time to list and track more detailed actions.

**Recommendation: At a minimum, use the timeline once a week to keep track of meetings, milestones, key deadlines. Print it out and use as an easy, visual reminder of what's coming up.**



A closer look at "the next two months"

Action List Over Time: list and track upcoming task detail....

**Overview of Current Activities**

**Action List Over Time [Page 1 of 8]**

Activity Group	w/c 14 February	w/c 21 February	w/c 28 February	w/c 7 March
<b>Client A: Strategy Review</b>	<b>Client A: Strategy Review</b>			
		<ul style="list-style-type: none"> <li>Review with Team (Fri 25 Feb) - (Me!)</li> <li>Call Bob at client (Fri 25 Feb) - (Me!)</li> <li>Ian - team performance review? (Fri 25 Feb) - (Me!)</li> <li>SC presentation outline (Fri 25 Feb) - (Ian)</li> </ul>	<ul style="list-style-type: none"> <li>2nd presentation review - Ian (Thu 03 Mar) - (Me!)</li> </ul>	<ul style="list-style-type: none"> <li>SC Mtg (Mon 07 Mar) - (Me!)</li> </ul>
<b>Client B: Cost Savings Initiative</b>	<b>Client B: Cost Savings Initiative</b>			
	<ul style="list-style-type: none"> <li>Finalise team with internal allocations (Mon 14 Feb) - (Me!)</li> </ul>	<ul style="list-style-type: none"> <li>Brief team leader (Fri 25 Feb) - (Me!)</li> </ul>	<ul style="list-style-type: none"> <li>Kick off meeting (Wed 02 Mar) - (Me!)</li> </ul>	

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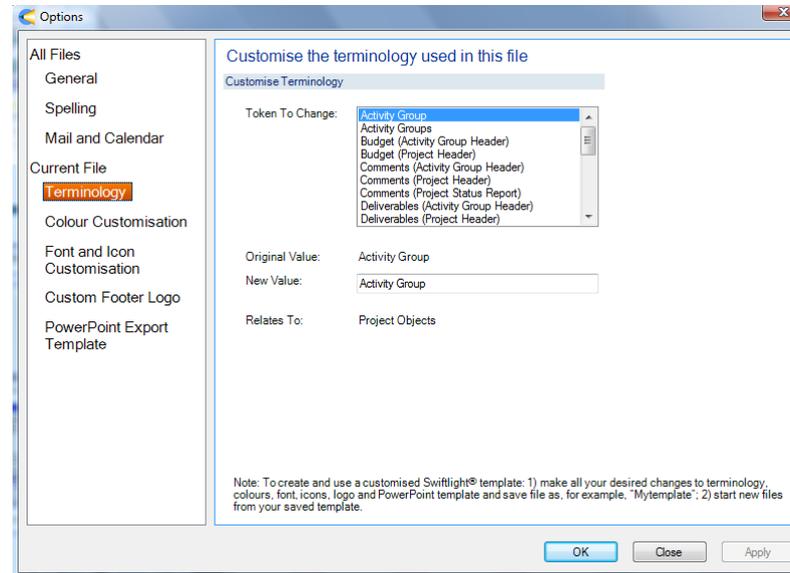
### • **Tips**

- Changing terminology in Swiftlight
  - Adapting colours / fonts to create a customized file
  - Other
- 
- Links to example files

# Tips

## Changing Terminology In Swiftlight

- You can easily change the key terminology in Swiftlight to align it with the needs of your organization or project
  - Use the menu: Tools > Options > Terminology, to open the dialogue (illustrated below) and then select which parts of Swiftlight's terminology you want to change

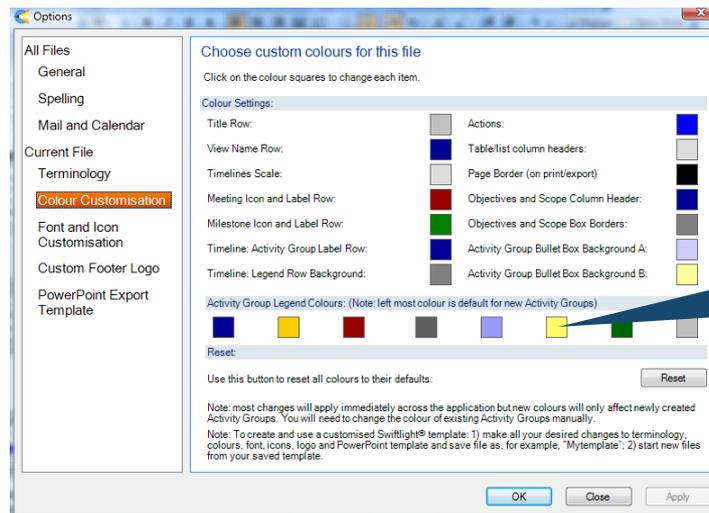


- E.g. Change "Activity Group" to "Workstream", and "Activity Groups" to "Workstreams"
- These changes apply **within the one file** and not across all your files, so you can have different terminology in different files as dictated by project or client needs.
- If there is a standard terminology set that you want to use across all your files, then create a "template file", save it, and use that file as the starting point for all your new files.

# Tips

## Adapting Colours, Font to Create a Customized File

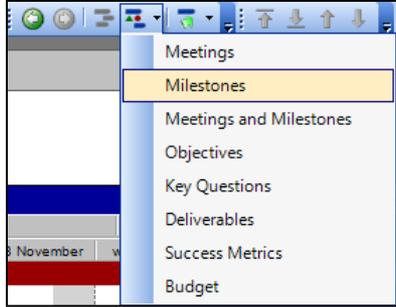
- Swiftlight allows you to change colours and fonts so that you can align outputs with your preferences, or with the requirements of your company's or client's branding. To see an example of what this can look like: [click here](#)
- To change colours or fonts, use the menu: Tools > Options and then select the colour customization tab (shown below) or fonts tab and follow instructions:



- Any changes you make apply **within the one file** and not across all your files, allowing you to have different colour / font settings in different files as dictated by project or client needs.
- To create a standard "brand customized file", first make all your desired changes, then save the file (e.g. as "MyBrandTemplate" and then use that file as the starting point for all projects needing that branding.
- Notes:
  - If you work through all the items you can change **every** colour in Swiftlight views display, effectively allowing you total control over the "look and feel"
  - Getting a good looking combination of colours can be tricky, and it is generally best to start out with a desired colour design (e.g. branding guidelines) rather than trying to create them on the go
  - It is recommended that you set up colours etc, save, close and re-open **before** adding content to your file. This ensures that the colour scheme is applied from the start.

# Tips

## Other Tips & Shortcuts

Where	What	How
General	<ul style="list-style-type: none"> <li>Changing terminology (e.g. changing "key questions" to "key steps")</li> </ul>	<ul style="list-style-type: none"> <li>Use the menus: Tools &gt; Options &gt; Terminology</li> <li>You can change the terminology either at the project level (which affects the Objectives and Scope view and the top section of the Timeline and other views), or at the activity level (which affects the Activity Group Detail and the Activity Group Summary)</li> </ul>
	<ul style="list-style-type: none"> <li>"Crossing out" an action item when it is completed</li> </ul>	<ul style="list-style-type: none"> <li>CNTL + Enter (in the Action List, Activity Group Detail, Action List over Time views)</li> </ul>
Timeline	<ul style="list-style-type: none"> <li>Switching display mode (e.g. to see Activities and their Milestones in the lower section of the timeline)</li> </ul>	<ul style="list-style-type: none"> <li>Use the short cut on the tool bar</li> </ul> 
	<ul style="list-style-type: none"> <li>Switching to/from "Review Mode"</li> </ul>	<ul style="list-style-type: none"> <li>CNTL + R</li> </ul>
	<ul style="list-style-type: none"> <li>To get more rows for activities</li> </ul>	<ul style="list-style-type: none"> <li>Right click and "Add Timeline Row" (adds one row at a time)</li> <li>Open the Activity Group Rows tab in the format dialogue: either increase the number of rows (to add many rows at one time) or reduce the minimum height of Activity Group rows so that you can get more rows on each page</li> </ul>
	<ul style="list-style-type: none"> <li>To allow more / less text to get displayed for meetings / milestones</li> </ul>	<ul style="list-style-type: none"> <li>Open the format dialogue and use the "Meeting and Milestone Format" tab to control the height and width of meetings and milestones</li> </ul>
Action List over Time	<ul style="list-style-type: none"> <li>To switch between displaying "to-do" items by Activity vs by Person / Contact</li> </ul>	<ul style="list-style-type: none"> <li>Click on the top of the left hand column</li> <li>Or use the format dialogue, Display Mode tab</li> </ul> 
Power-Point tip	<ul style="list-style-type: none"> <li>Cropping an exported page in PowerPoint</li> </ul>	<ul style="list-style-type: none"> <li>Click on the object, right click and select "Show Picture Toolbar"</li> <li>Click on the crop icon (  ) on the picture toolbar and then crop the page as required</li> </ul>

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### • **Links to example files**

## Links to example files

- The following example files can be downloaded in a zip file from our website (some of these files have been used as examples at different points through this toolkit):
  - Use 1) - Timelines (and other outputs) for proposals / meetings
    - 2011ProcessExample.pxp - 3 Month Process Improvement Initiative
    - 201115WeekProposal.pxp - 15 Week IT / Process Assessment
    - LaunchExample.pxp - 3 Year High Level Pharma Launch Plan
    - 2011ProjectGamma.pxp - M&A / Transaction Plan
  - Use 4) - In depth project management of an active engagement
    - 2011ConsultingProjectExampleFile.pxp
  - Use 7) - Partner perspective: overseeing multiple projects
    - 2011MyCurrentActivities.pxp
- To download these Swiftlight files, just: [click here](#)