

# Setting yourself up right. Checklist & Step-by-Step Guide

This is a simple step by step guide to help you get started in the right way. Preparation is not everything but setting yourself up right, will make a lot of things easier later on and can make a big difference whether you succeed or not.



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## Step 1: Define your SMART Objective

SMART stands for Specific, Measurable, Attainable, Relevant, and Time-Bound. So sit back and try to formulate in the best possible way what you want to achieve.

### Checklist:

- My objective is to: \_\_\_\_\_
- I want to achieve this objective because: \_\_\_\_\_

I want to achieve this objective until: \_\_\_\_\_

I can measure this objective by: \_\_\_\_\_

Now from today's view, do you think that you can:

Achieve the objective:            **yes / no**

Is it relevant, i.e. does it match your long-term goal:       **yes / no**

**Examples:**

<b>Project</b>	<b>Lose Weight</b>	<b>Start a side business</b>	<b>Develop a new software functionality</b>
<b>My objective is:</b>	Lose 20 kg	Start selling on Amazon	Build a new module for users to save their favorite pages on my website
<b>I want to achieve this objective in</b>	6 months	2 months	3 months
<b>Can I achieve this objective</b>	yes	yes	yes
<b>Does it match my long-term goal</b>	Yes - I want to get a six pack	Yes - I want to expand my internet selling business	Yes - I want to build out my website which does this and that for its customers

## Step 2: Find the Mentor / Accountability Coach

We moved this step up as it is quite critical to have a good mentor around as early as possible.

**Your mentor will guide you through the initial steps** and help you find the right experts. It is recommended that your mentor has achieved what you are planning to achieve and is further up the experience ladder.



**Your mentor / accountability coach will also hold you accountable** to your goals and timelines. Therefore it should be someone you respect and that you do not want to disappoint.

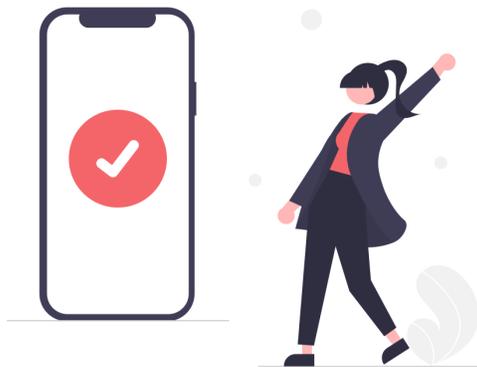
**Agree weekly alignment calls** with them. This will push you towards keeping your weekly targets and you can get their guidance and input on a regular basis.

### Checklist:

- Find a mentor
- Agree weekly calls

## Step 3: Do you really want to do this?

Just wanting to be a great entrepreneur or that it would be great to have that beach body is not enough. This requires a lot of effort and you need to be clear about that when you get into it. Is your heart in it?



Otherwise stop here and do something else. It is not about the money. It is about you really wanting this.

Have a look at the questions below. You do not have to tick all the boxes but if you cannot tick one of them then you should seriously think about your commitment.

### Checklist:

- Are you willing to skip Saturday's night out or Sunday sleeping in to get this done.
- Can you tell your family and friends that you cannot join or do not have time for something in order to focus on tasks that need to be finished. Be honest!
- Did you already discuss your project with your partner / family?

## Step 4: How much time can you commit?

This is very important. In your initial enthusiasm, you plan to do so much in such a short time. All will be done in a week. Then 2 months later nothing is completed. And you quickly reach the point where there is so much to do that you do not know how to deal with it.

One of the best approaches is to block some time. It is called compartmentalization. Best block the same time every day. And then commit to use the time to work on your tasks.

There are some very helpful approaches to manage your tasks and not get overwhelmed by them. One that always works for me is divide and conquer.

It is very simple: you just split a big problem / challenge into a lot of smaller components until you can handle it. Launching a blog - just start with the landing page, too much? Get an account on a blogging platform and put a few lines about your intended blog.



The next step is to break it down into chunks that you can manage when sitting down to work on them. Writing a whole article is a lot of work.

When sitting down only plan something that you can manage in 15-20 minutes, e.g. write down a few headline ideas. Next time you will then write the 3-6 point structure of your article.

These are all manageable tasks. Key is to get started with a small task. Once that is done you feel less pressure and it is easy to move to the next task.

In the above example, once your headline is written, the structure of the article and maybe a first paragraph happen all in the same session. Only getting started removes big blockers.

#### **Checklist:**

- Block some time every day, at least 15-20 minutes. For some activity 15-20 minutes will not be enough, so make sure you can block enough time as needed.**
- Review your approach with your mentor.**

## Step 5: Assemble your team

Once you start building your team, getting started and moving forward will be much easier, even if you are still in the preparation phase.



Here is the core team that you should try to assemble:

### → Expert(s)

It is crucial to find someone that really knows the field where you try to get your project going. If you are trying to lose weight then you want to find someone who is really good at helping people lose weight.

To lose weight, that will probably be a dieting coach and not a fitness coach. The expert(s) will guide you and provide all the details for your planning.

Depending on your project you might need several experts. They do not have to support you full-time.

In the fitness and dieting field, your expert often can double as the accountability Coach / mentor because they often have achieved the same goal before.

### → Fans

Think about the home team often playing better than the away team. One of the reasons is that they have their fans cheering them on. It simply helps to have someone being on your side and making you feel good about what you do.

They do not really question you. They are simply there, thinking it is great what you do.

### → Friends

You need your friends to allow you to let your armour down during the low moments.

They are there for you and you know you can rely on them. Fans can be disappointed

but friends are always there. And that is something that you also need to keep you going.

→ **Additional Team Members**

Sometimes it is only you but sometimes it is a whole team that you need to realize your project. But let's wait until we have an idea about the plan in the next step.

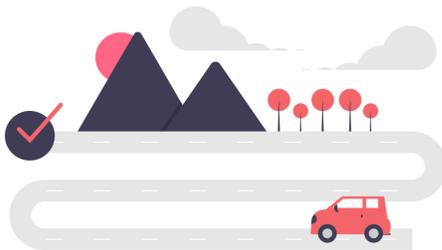
**Checklist:**

- You have the right experts.**
- You have some fans (and sometimes just one is enough).**
- You have your friends.**

The expert is a must. Fans and friends you hopefully have but you can work on that while working with your expert.

## Step 6: Build a Key Milestone Plan with your Expert

The Expert(s) will help you to build a plan with key milestones. Based on your personal circumstances they can work out the details.



The two key components here are time and budget. If you have only 15 minutes every day then you will progress slower (which is ok) and you need to stretch your timelines.

Also the budget has an impact as it will limit how much outside help you can get for certain tasks.

Once the plan is aligned you might want to actually get a team. We mentioned that before.

→ **Team**

Depending on the size and complexity of your project you might need a team to execute your project. That team you would build with the help of various experts.

Do not attempt to build a software development team if you are not a senior developer



It is pretty easy to use. In the backlog column you put all the tasks that you and your expert think should be done.

To avoid overplanning and spending endless time on this, only populate the task for the next 4-6 weeks. Put them in decreasing priority on the board, i.e. the most urgent tasks should be on top.

You can add more tasks if you have them but do not try to plan all detailed tasks in the far future. There is a good chance that many of these will change content and priority.

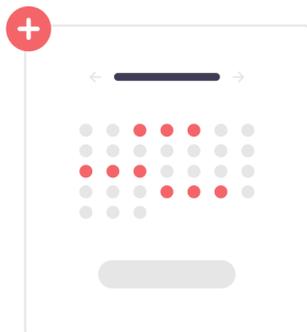
But whenever something comes to your mind that the team should consider or keep in mind for the future, simply add it to the backlog.

**Checklist:**

- Backlog has been created.**

## Step 8: Managing the Backlog with your Expert & Team

Simply starting can work sometimes but it is best if you follow a clear structure. Science has shown that you are more effective when you compartmentalize your time.



You block time for specific activities, ideally at the same slot for the same type of activity. It is like going every evening at 18.00 to the gym or eating lunch every day at 12.00.

In Agile SCRUM these fixed time slots are called ceremonies and help you go through so called sprints. A sprint is a fixed period within which you focus on a specific set of tasks. Sprints usually last 2 weeks.

If you are doing something alone just with an expert and coach, friends and fans then

it is better to use a one week cycle. If you are doing something in a team then usually 2 week sprint cycles work best.

But why use sprints? Agile uses sprints because it forces you to focus on a set of tasks within a limited time frame. You are not planning things that might happen in the far future and then will not happen. You are simply focusing on the tasks at hand that bring the most value to your customer.

Ideally you also have a good plan for the next 1-2 sprints but your focus is on the tasks that you want to get done this sprint.

### **Here are the minimum ceremonies you should have:**

**Sprint Planning:** Align with the expert and team which stories will get executed during this sprint. Review acceptance criteria and detailed tasks to complete this activity / story. The team has to be in agreement that the scope is feasible and each story owner understands the stories and the acceptance criteria.

Sprint planning should not take more than 2 hours. If you are alone you should still do this, possibly with your expert and coach or get their feedback on your plan. Alone you should be able to complete this in 30 minutes.

**Daily Stand-ups:** Classical stand-up where everyone gives a 90 seconds update and highlights any issues or blockers. Issues or blockers will not be discussed during the meeting but a separate time with the relevant people will be found. Make sure the stand-up does not move into a problem solving or discussion meeting. It will waste most people's time. Try to stick to a max 15 minutes for this meeting.

If you are working on your project or product alone then you can use this time to go through the planner. If you are in a difficult patch then you might want to have short daily alignments with your coach and or expert. Usually you would also move your stories / tasks from one status to the next.

Finally if your team is new to a topic it can be helpful to schedule an additional 15 minutes after the standup for brief alignments for the whole or parts of the team.

**Sprint Demo:** To show the results of your sprint work, schedule a sprint demo. Your key stakeholders or your customers should be present. You will show them your work and get their feedback on improvements or additional features.

**Sprint Retrospective:** After the demo schedule 15-30 minutes with your team to reflect upon what went well and what did not. What do you plan to improve in your next sprint? If you are working alone then do this with your expert and / or coach.

**Backlog Grooming:** Your backlog should be a living document. As the product owner you should update it when necessary but you should also plan a few regular review sessions.

Most important is a grooming session with your team. In the team grooming session you will review acceptance criteria and tasks for the stories in the next two sprints. Your grooming session might take between 2-3 hours. The one with the team around 1-2 hours. If you are alone this will be quicker as the backlog is smaller and no team session is needed.

**Checklist:**

- Schedule Sprint Planning meetings in your agenda for the next three months**
- Schedule Daily Standups in your agenda for the next three months**
- Schedule Sprint Demo meetings in your agenda for the next three months**
- Schedule Sprint Retrospective meetings in your agenda for the next three months**
- Schedule Backlog Grooming Sessions in your agenda for the next three months**
- Schedule Team Backlog Grooming Sessions in your agenda for the next three months**

## Step 9: Ensure Good Communications

Most of the time when things do not work out between people it is because of lousy communication. Anything that changes the status quo has the potential for a big communication problem. Usually, because someone is upset that they were not told or involved in a decision as they think that they should have been.



So to avoid this with your project sit down and list all the people or groups that are somehow impacted. If you are losing weight then at least all people living with you and everyone doing things regularly with you will be impacted.

Your family, friends and colleagues will have to get used to the fact that your eating habits will change considerably. It is better to tell them and to get them in line with your plans. Then they know to save their comments and to not tempt you unnecessarily.

List your stakeholders:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

In complex projects you plan communications for each major stakeholder group. For simplicity it should be easy enough to sit down once a week and plan out who you need to communicate what to. That includes successes in your project! Add those tasks to your backlog. Make sure they are on the top of your backlog.

Make this part of your backlog management process above and always consider communication. Make sure to also check with your expert and mentor / accountability coach.

To start with good communication, inform all that you are planning this project. Why? When planning there might be important input from your key stakeholders, e.g. a vacation that you need to consider, experiences they had doing a similar project.

This initial communication can happen in parallel with your planning as there can be quite some input and feedback.

**Checklist:**

- List your stakeholders.
- Complete any urgent communication.
- Make communications part of your backlog management process.

## Step 10: The Right Setup & Setting

We have partly touched on this before. When you run projects at work then a few things need to be right: timing, senior management support, team, budget, project location, potentially external markets or external groups open to what you will be working on.

This all falls into this bucket of setup & setting. Sometimes things do not fit, e.g. building new housing when no one can get mortgage credits.

Starting a new diet when you are changing jobs, moving house and entertaining customers.

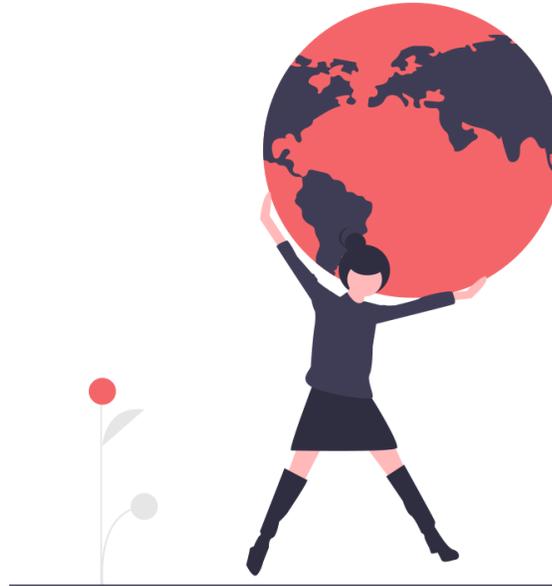
There is no categorical 'not possible' but sometimes it might make more sense to wait. So when you go at it, make sure you are prepared. All things align - not perfectly - but in a sufficient way.

Your experts should be able to help you to assess this. A lot of this setup you can influence and work on. So the ones that you can impact, make sure you do.

For everything that is spent related, just spend as little as possible until you know that you are in it for the long haul.

**Checklist:**

- You are all set to start.



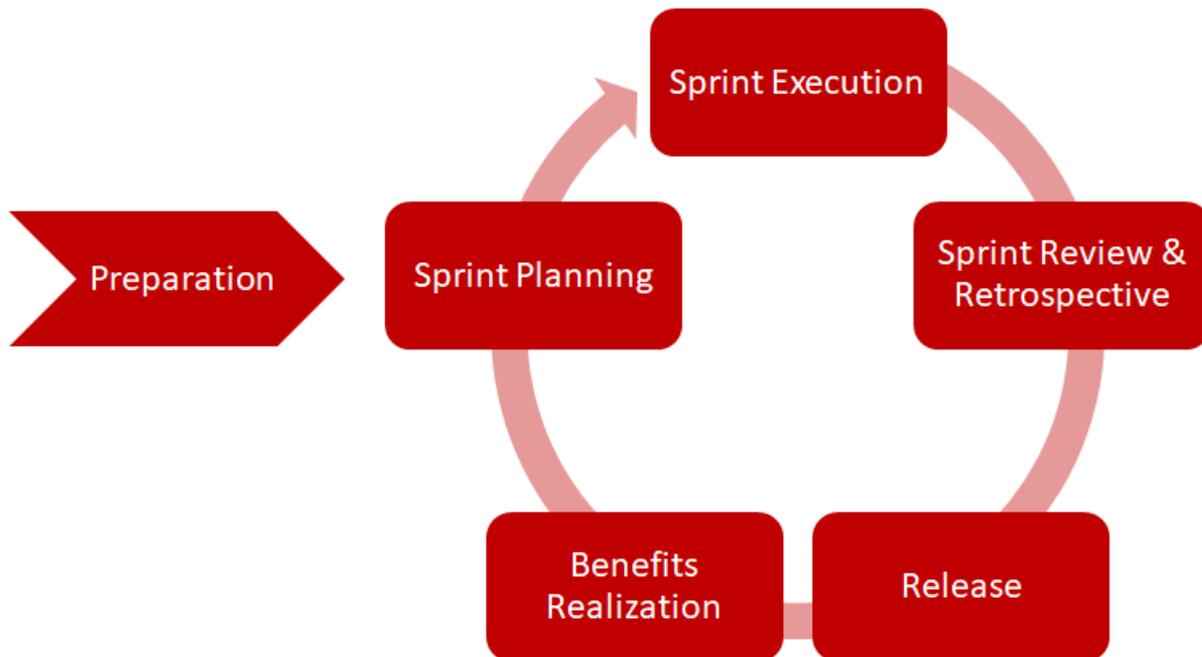
## Step 11: Execute

Do not overplan but rather execute fast and learn quickly.

Keep this in mind.

Define your sprints and rather do them shorter than longer, ideally 2 weeks.

Sit down with your team and collect all the tasks that you want to do in the next sprint. Make sure your experts are with you to guide the process. That way you will only plan activities that make sense and focus on achieving your objectives.



**Divide & Conquer:** Nothing revolutionary but still helps to deal with most work. Depending on how much it helps you to get started, break down the first task that you assign to yourself into digestible 15-20 minute blocks. You can do that every few days for the next 2-3 days.

### Example

So you could decide to:

- Day 1: Find the article topic and collect title ideas.
- Day 2: Sketch the structure of the article. Review the titles.
- Day 3: Write the first paragraph of the article.
- Day 4: Write a really exciting version of the first paragraph, so people get hooked to reading the rest.

After Day 3 review where you are and adjust. Be sure to not aim for 100%. It is a draft and rather make sure you have something to refine than nothing because it was not perfect.



Use daily standups to align how the team is progressing.

If you are alone that might not be possible but maybe your expert in the beginning has time for quick check-ins.

Make this 10-15 min every day or every second day.

Remember to schedule your weekly review with your mentor / accountability coach. And don't forget good communications.

Put all of this in your calendar. Block specific times for it.

At the sprint end, review results with your team and any major stakeholder that should see your progress. **Sounds formal but you are trying to achieve something, then do not treat it like it is not important.**

See you when you are done!

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