**Lesson Plan-Planning and Implementing a Business Project-Part 2**

**Course Title:** Business Information Management II (BIM II)

**Session Title:** Planning and Implementing a Business Project-Part 2

**Performance Objective:**
- Upon completion of this lesson, the student will understand how to plan and implement a business project

**Specific Objectives:**
- Students will understand the processes involved in conducting a business project
- Students will understand how to graphically display tasks involved in a project
- Students will understand how to determine time frames of tasks involved in a business project

**Preparation**

**TEKS Correlations:**
- **130.115.c.1.A-D** – implement a project; manage a project team; monitor a business project; minimize a business project’s errors
- **130.115.c.2.B-D** – demonstrate use of content, technical concepts, and vocabulary when analyzing information and following directions; record information needed to present a report on a given topic or problem; write internal and external business correspondence that conveys information effectively using correct grammar, spelling, punctuation, and capitalization
- **130.115.c.3.B** – organize information to use in written and oral communication
- **130.115.c.4.A** – use informational texts, Internet websites, and technical materials to review and apply information sources for occupational tasks
- **130.115.c.5.A-C** – prepare oral presentations to provide information for specific purposes and audiences; identify support materials that will enhance an oral presentation; prepare support materials that will enhance an oral presentation
- **130.115.c.7.B&E** – employ verbal skills when obtaining and conveying information; use academic skills to facilitate effective written and oral communication
- **130.115.c.8.A** – create tables, charts, and figures to support written and oral communication

**English:**
- **110.33.b.1.A&C** – determine the meaning of grade-level technical academic English words in multiple content areas (e.g., science, mathematics, social studies, the arts) derived from Latin, Greek or other linguistic roots and affixes; infer word meanings through the identification and analysis of analogies and other word relationships.
- **110.33.b.12.B-D** – evaluate the interactions of different techniques (e.g., layout, pictures, typeface in print media, images, text, sound in electronic journalism) used in multi-layered media; evaluate the objectivity of coverage of the same event in various types of media; evaluate changes in formality and tone across various media for different audiences and purposes.
### Accommodations for Learning Differences:
It is important that lessons accommodate the needs of every learner. These lessons may be modified to accommodate your students with learning differences by referring to the files found on the [Special Populations page](http://www.businessballs.com/project.htm) of this website.

### Teacher Preparation:

#### References:
1. [http://www.businessballs.com/project.htm](http://www.businessballs.com/project.htm)
3. [http://microsoft.com](http://microsoft.com)

#### Instructional Aids:
1. “Planning and Implementing a Business Project” PowerPoint Presentation
2. Planning and Implementing a Business Project Assignment Sheet
3. Flow Chart Assignment #1
4. Flow Chart Rubric
5. Gantt Chart Assignment #2
6. Gantt Chart Rubric
7. Project Interview Summary Assignment #3
8. Project Interview Summary Rubric
9. Internet

#### Materials Needed:
1. Poster boards or binders in which to place project documents (flow chart and Gantt chart)

#### Equipment Needed:
1. Computers for students to complete projects
2. Projector for PowerPoint
3. Document camera or board

#### Learner Preparation:
1. Remind students of the business project ideas they created in the previous lesson. Or if they have not done the lesson on creating a business project, provide them with examples of different projects a business may conduct, such as rolling out a new product, moving into a new office location, or putting on an awards ceremony for the sales department.
2. Ask students what can happen to a project when there is no plan of how to achieve the project goals. Have a student write the pitfalls of not having a plan on the board.
3. Ask students if they are planning a project with a group how they will determine who completes which tasks.
4. The teacher can show the “Pancake Breakfast” project planning sheet on the HP web site to show the students how many details there can be in planning a project, which is the reason why many projects are planned with a team.

### Lesson Plan

**Introduction (LSI Quadrant I)**

1. Students can be divided into pairs. They may use the project idea they created in the previous lesson or create a new idea.
2. Students can brainstorm the various tasks involved in the project and create a list together. The steps do not have to be in order at this point.
3. Have the students create a visual representation of how the tasks would be listed. The purpose of this is to show students that most people prefer to view visuals as opposed to written text when it comes to project details.

4. Each pair can present their visuals on a document camera if one is available.

**Important Terms for this Lesson:**
- **GANTT chart** - provide an easier way to see how many tasks are involved in a project and the approximate time frame and duration involved with each task. GANTT charts are named after Henry Gantt who was an engineer.
- **Flowchart** - a graphic representation, using symbols interconnected with lines, of the successive steps in a procedure or system.

**Outline**

**Outline (LSI Quadrant II)**
Instructors can use the PowerPoint presentation, slides, handouts, and the internet in conjunction with the following outline.

<table>
<thead>
<tr>
<th>MI</th>
<th>Outline</th>
<th>Notes to Instructor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>I. Planning a Business Project</td>
<td>A successful project requires detailed planning. Today many people either write Post-It notes® to record their ideas or they sit down at a computer and start typing without any planning.</td>
</tr>
<tr>
<td>![Person]</td>
<td>A. List the steps involved</td>
<td>Ask students if they have been to any events that probably required planning. List their responses on the board across the top (or on a document projector). Looking at one project at a time, ask students what steps were involved in planning those events. Record the steps under each of the projects. Then have a student underline a step that is similar to each event, Circle another step that is similar, and so on. Eventually they should conclude that many steps are similar regardless of the project.</td>
</tr>
<tr>
<td>![Note]</td>
<td>B. Estimate how much time each task will take</td>
<td></td>
</tr>
<tr>
<td>![Note]</td>
<td>C. Assign person(s) responsible</td>
<td></td>
</tr>
<tr>
<td>![Note]</td>
<td>D. Put tasks in order</td>
<td></td>
</tr>
<tr>
<td>![Note]</td>
<td>II. What kind of tasks?</td>
<td></td>
</tr>
<tr>
<td>![Note]</td>
<td>A. Completion date</td>
<td></td>
</tr>
<tr>
<td>![Note]</td>
<td>B. Do we need:</td>
<td></td>
</tr>
<tr>
<td>![Note]</td>
<td>- money</td>
<td></td>
</tr>
<tr>
<td>![Note]</td>
<td>- supplies</td>
<td></td>
</tr>
<tr>
<td>![Note]</td>
<td>- volunteers</td>
<td></td>
</tr>
<tr>
<td>![Note]</td>
<td>- a specific location</td>
<td></td>
</tr>
<tr>
<td>![Note]</td>
<td>C. How long will the tasks take</td>
<td></td>
</tr>
<tr>
<td>![Note]</td>
<td>D. Who is responsible</td>
<td></td>
</tr>
</tbody>
</table>
III. Using flow charts as visual representations (before implementation)
   A. Shows task name
   B. Shows the order of tasks

VI. Gantt Charts (during implementation)
   A. Shows the duration of tasks, like a visual timetable
   B. Shows time spent as well as time remaining on tasks.

VI. Benefits of Project Planning
   A. Reduces risk and surprises
   B. Ensures inclusion of all details
   C. Enables deadlines to be met

Ask students in pairs to select an event from the board and make a list of all the things that could have gone wrong with that event. Would these things have been preventable through better planning?

Ask students in pairs to brainstorm steps involved in planning a “Pancake Breakfast”. See if their lists compare to the one on the HP website (place on the document camera or projector so students can compare). Ask them if they visually saw the steps would it be easier to tell how long each task would take?

Discuss what can go wrong with the “Pancake Breakfast” and how to prevent it.

Copy and Paste Multiple Intelligences Graphic in appropriate place in left column.

Guided Practice (LSI Quadrant III): Using the PowerPoint presentation, the teacher will explain to students the importance of the planning process as it relates to project management. As a way to begin the planning process, the groups must first be defined. The number of students in a group may depend upon the class size.

Distribute a simple project idea, such as “How to Send a Text Message” or “How to Make Macaroni”, to each group. Give each team member 5 Post-It® notes. Each member will then have a preset number of minutes to write down specific tasks or steps...
involved in completing the project (5 or 10 minutes).

Provide each group with either a Post-It® flipchart page or poster board and give them 10 minutes to display their Post-It® notes. Eliminate the duplicates and have them add any that they think are needed but were left out.

Then provide time for students to put the notes in order, assign a team member to each of the tasks, and also place a time frame for completion for each task. If time allows, the students can present their results to the class and at the end of their presentation, the teams can ask the class if they have any other steps that may have been left out.

Now explain to the students that using sticky notes may not be the most efficient or professional way to plan out a project, but they should get the idea of the major steps involved in project planning through this exercise.

**Independent Practice (LSI Quadrant III):**

- **Flow Chart Assignment #1**
  Using the project idea created in either this lesson or the previous one, the students will determine the tasks involved in their project and create a flow chart containing each one of the tasks. They may use shapes with the appropriate labels or a SmartArt graphic. Students may also use PowerPoint to create a flow chart. They can then connect the shapes using arrows or other connectors. If the teacher has a lab with Inspiration, Visio, or any other flow charting software, it may be used instead of Word or PowerPoint. Assignment will be evaluated using the related rubric.

- **Gantt Chart Assignment #2**
  After the project has been defined and tasks organized, time frames must be assigned to each task. A Gantt chart is a visual tool that shows tasks and how long each will take to implement and is basically a schedule of the project. This can be done easily in Excel (tutorials are on Microsoft.com) by having students input task names and the duration of each task into a spreadsheet and creating a horizontal bar graph. By changing the colors of the components of each bar, the time frames appear suspended and you can see visually how long each task will take. The Excel graph will be evaluated according to the assigned rubric.

- **Project Interview Summary Assignment #3**
  Students will interview someone in their school who has recently implemented a project (teacher, principal, or other project supervisor). They will ask questions to determine the tasks involved and the duration of the tasks. They will inquire about the issues that were involved in planning the entire project and how well the project’s supervisor thought the planning was carried out, including any improvements the supervisor would have made. Then they will write a two-page summary of their findings using appropriate business report format (double-spacing, 1” margins, and heading styles). The summary will be evaluated according to the assigned rubric.

**Summary**

**Review (LSI Quadrants I and IV):**

Q: What is an advantage to planning a project as opposed to ‘on the fly’?
A: Risk can be reduced and chances of success increased because there are more
checks on the details and the progress of events.
Q: What can a flow chart show in a project?
A: The specific tasks involved as well as the order of the tasks.
Q: What is the purpose of a Gantt chart?
A: To show a visual timetable of project tasks.

<table>
<thead>
<tr>
<th>Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Informal Assessment (LSI Quadrant III):</strong></td>
</tr>
<tr>
<td>1. Instructor will observe students during Independent Practice.</td>
</tr>
<tr>
<td>2. Instructor will assist students as needed.</td>
</tr>
<tr>
<td><strong>Formal Assessment (LSI Quadrants III and IV):</strong></td>
</tr>
<tr>
<td>Use the assigned rubrics to evaluate the Independent Practice Assignments.</td>
</tr>
<tr>
<td><strong>Extension/Enrichment (LSI Quadrant IV):</strong></td>
</tr>
<tr>
<td>1. Students will create an actual project that they will conduct and complete a flow chart and Gantt chart. Have a supervisor of the project sign off on the charts.</td>
</tr>
</tbody>
</table>
**Business Information Management II - Planning and Implementing a Business Project-Part 2**

**Independent Practice Assignments**

**Flow Chart Assignment #1**
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Business Information Management II – Planning and Implementing a Business Project

Flow Chart Rubric
Assignment #1

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>20</th>
<th>15</th>
<th>10</th>
<th>5 or less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required Elements</td>
<td>Flow chart contains shapes with all tasks and responsible member names</td>
<td>Flow chart missing 1-3 member names assigned to each task</td>
<td>Flow chart either missing 1-3 task names or 4-6 member names on each task</td>
<td>Flow chart either missing all member names or more than 3 task names.</td>
</tr>
<tr>
<td>Appearance</td>
<td>Flow chart is exceptionally attractive relative to design, creativity, and layout</td>
<td>Flow chart is adequately attractive regarding neatness and design.</td>
<td>Flow chart is unorganized and inconsistent in terms of layout and design.</td>
<td>Flow chart is poorly designed and unattractive.</td>
</tr>
<tr>
<td>Sequence</td>
<td>Flow chart tasks are sequentially accurate showing all connectors.</td>
<td>Flow chart tasks are sequentially accurate but missing 1-3 connectors.</td>
<td>Flow chart tasks are sequentially accurate but missing 4-6 connectors.</td>
<td>Flow chart tasks are not in the appropriate order with connectors missing.</td>
</tr>
<tr>
<td>Cooperative effort</td>
<td>Group worked exceptionally well together to identify a significant number of tasks and divided tasks equitably</td>
<td>Group worked well together on tasks and responsible members but number of tasks is not significant.</td>
<td>Group had some difficulty working together and produced an average amount of tasks.</td>
<td>Group did not work well together and many tasks were missing.</td>
</tr>
<tr>
<td>Tasks related to project</td>
<td>All tasks specified related directly to project.</td>
<td>1-2 tasks specified not necessary for project idea.</td>
<td>3-4 tasks specified not necessary for project completion.</td>
<td>5 or more tasks not necessary for project.</td>
</tr>
</tbody>
</table>

Total Score __________
Maximum 100 Points
### Business Information Management II – Planning and Implementing a Business Project
#### Gantt Chart Rubric
##### Assignment #2

**Student Name:** ________________________________

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>20</th>
<th>15</th>
<th>10</th>
<th>5 or less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required Elements</td>
<td>All task names and durations are easily displayed on the Excel chart</td>
<td>1-2 labels missing from chart</td>
<td>3-4 labels missing from chart</td>
<td>Graph missing or incomplete, no labels on chart</td>
</tr>
<tr>
<td>Readability</td>
<td>Task names and duration time frames easily readable</td>
<td>Task names and duration time frames slightly difficult to read due to font size or type</td>
<td>Task names and duration time frames difficult to read due to truncation</td>
<td>Task names and duration time frames misspelled or illegible</td>
</tr>
<tr>
<td>Appearance</td>
<td>Excellent use of color which differentiates the duration of the different tasks</td>
<td>Adequate use of color to differentiate the duration of different tasks</td>
<td>Ineffective use of color makes distinguishing duration time frames difficult to determine</td>
<td>Chart in grayscale or colors not changed therefore making differentiation impossible</td>
</tr>
<tr>
<td>Content</td>
<td>Graph demonstrates exceptional understanding of purpose of Gantt chart</td>
<td>Graph demonstrates adequate understanding of a Gantt chart</td>
<td>Graph shows limited understanding of the purpose of a Gantt chart</td>
<td>No understanding of the Gantt chart concept present</td>
</tr>
<tr>
<td>Time and Effort</td>
<td>Effective use of class time and effort</td>
<td>Adequate use of class time and effort</td>
<td>Graph completely too quickly to utilize class time effectively</td>
<td>Too many distractions to create an effective chart</td>
</tr>
</tbody>
</table>

**Total Score __________**  
Maximum 100 Points
### Business Information Management II – Planning and Implementing a Business Project

#### Project Interview Summary Rubric

**Assignment #3**

Student Name: ________________________________

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>20</th>
<th>15</th>
<th>10</th>
<th>5 or less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mechanics</td>
<td>No grammatical or punctuation errors in report.</td>
<td>1 grammatical or punctuation error.</td>
<td>1-2 grammatical or punctuation errors.</td>
<td>Several grammatical or punctuation errors</td>
</tr>
<tr>
<td>Formatting</td>
<td>Report is properly formatted with double spacing, 1” margins, and heading styles.</td>
<td>Report is missing one formatting element.</td>
<td>Report is missing two formatting elements.</td>
<td>Report does not follow any formatting guidelines.</td>
</tr>
<tr>
<td>Content</td>
<td>Information in report demonstrates excellent understanding of topic</td>
<td>Information demonstrates adequate understanding of topic</td>
<td>Information shows spotty understanding of topic</td>
<td>Does not understand topic or concepts presented</td>
</tr>
<tr>
<td>Organization</td>
<td>Information is very well-organized with paragraph headings.</td>
<td>Information is organized but without paragraph headings.</td>
<td>Information is organized but paragraphs are not very well-written</td>
<td>Information is unorganized and difficult to understand.</td>
</tr>
</tbody>
</table>

**Total Score __________**

**Maximum 100 Points**