PROJECT ROADMAP TEMPLATE

HAWKSOFT

Empower your agency to implement projects using this simple 3-step roadmap

1 Determine the "Why"

Briefly explain why this project is necessary. What is the problem this project will solve? Provide concrete examples and numbers from your agency if possible, or statistics from the industry in general.

Example: McClain Insurance Disaster Preparedness "Why"

According to FEMA, 40% of small businesses do not reopen following a disaster, and of those that reopen another 25% will fail within one year.

We want to create a robust disaster preparedness plan to ensure the safety and wellbeing of our team and any clients or visitors who may be in our office when disaster strikes. We also want to continue to service clients to the best of our ability when an emergency occurs outside normal business hours.

2 Create a Plan

Document your plan to complete this project so the process can easily be repeated in the future. Here are some things your project plan should include:

- Steps of the process
  — Name and title of person responsible for each step
  — Timeline for each step

- Necessary tools, systems, and materials
  — Include links, file paths, logins, phone numbers, etc.

- Template to follow for easy repetition of the project
  — Include guidelines, checklists, communication templates, or scripts

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Example: McClain Insurance Disaster Preparedness "Plan"

- *Technology go-bag checklist for team remote operation*
- *List of potential disaster hazards in the Pacific Northwest region*
- *Crisis development procedure*
  — Shelter in place plan
  — Evacuation plan
- *Client disaster communication email template*
- *2-person 72-hour go-bags distributed to team for survival situations*
- *Emergency contact list of key contacts for disaster situations*

3

Include an Example

Provide one detailed example or case study of your plan in action to demonstrate the project. Include the actual communications you sent and the finished product. Share the results of the project and any unexpected obstacles you discovered or changes you needed to make to the plan so it can be implemented more smoothly next time.

Example: McClain Insurance Case Study – Snowmageddon 2019

*In February 2019, Washington state was hit with 4 snowstorms delivering more than 25"
of snow in many areas and knocking out power to hundreds of thousands of homes.*

- *Prior to the storm, sent a "Winter Storm Safety & Claim Information" email to clients (email content included)*
- *Adjusted office hours and worked remotely when necessary*
- *Used social media to keep clients up to date on office hours and share safety information (posts included)*
- *Posted up to date claims information on agency website*
- *Shared story of team member's storm-related homeowner's claim in monthly newsletter and on agency blog*
- *Invested in VoIP phone system to aid team in working remotely when necessary*

See full examples of McClain Insurance's Disaster Preparedness Roadmap and other roadmaps at autohomeboat.com/empower (password: UPP).