



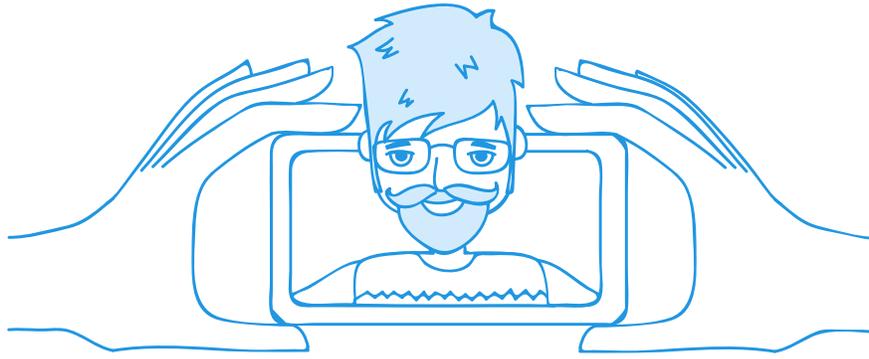
# Chapter 1

# What's Project Management?

And are you secretly a project manager?







## What Does the Secret Project Manager Look Like?

The Secret Project Manager probably didn't go to business school. She probably didn't get a management degree. The Secret Project Manager might be an engineer, a computer science graduate, a marketer, an advertiser or an editorial manager.

She or he is any person that leads a team of people towards a certain goal—and really, that could be anyone. They find themselves accountable to stakeholders, gives status updates on projects to higher-ups, or oversees budgets and resources for a team of people.

## Congratulations, You're a Project Manager! (And You're Going to Be Just Fine)

Congrats on your newfound title of Project Manager! Have we scared you? Does it sound all fancy and nebulous? The good news it's that **it's not**. The good news is that we've created this guide just for YOU, the project manager who doesn't know she's a project manager yet—and you're going to be just fine.

Whether you're the Marketing Project Manager, Engineering Project Manager, IT Project Manager, or PM of any other kind, we've got your back. We'll cover all the basics you need to succeed in your role, including: what a project is, the skills you need to make things run smoothly, and the 5 phases of a project—including getting things kicked off right and wrapping everything up at the end.

And by the end of it? You'll be a pro.



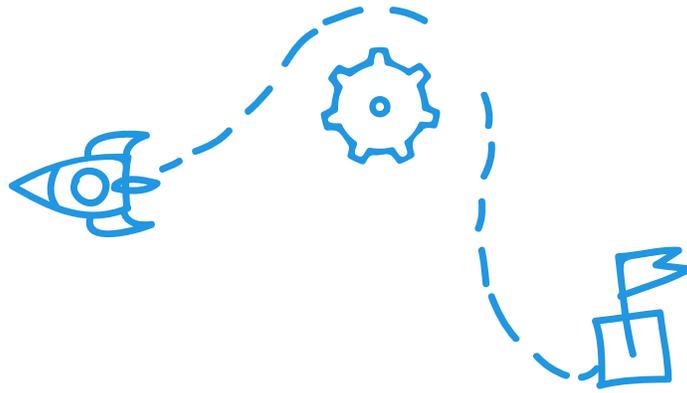
## What Is a Project?

Ah, our first lesson. We *did* say we were going to keep things simple and straightforward, didn't we? Did we? Well, we are. This guide is for those of you who haven't even ever *used* the words "project management" at work, so we're going to start from the bottom and work our way up.

Here's our **definition of a project**.

*A project is a **set of tasks grouped together with a common goal in mind** that: 1) has a clear start and finish; 2) creates something new (even if it already exists elsewhere); 3) has boundaries (such as project scope and specifications); 4) and has someone in charge or someone personally invested in the outcome.*

Whew! What a mouthful. Let's break it down.



## A Project Has a Beginning and End

What do we mean by that? Basically, a project has a **scope**, or a clear start, finish, and summary of everything that needs to get done in between.

It's not going to go on forever or even for a long period of time spanning, say, a few years (unless you're in research or architecture—then it might!). If it *did* go on for years at a time, it'd more likely be called a *program*, which is a group of *projects* with a common goal that are usually recurring and similar in scope, but just spread out over time.

But we won't get into that now. All you need to know is that a project needs a start date and an end date and an overview of what needs to happen in between. Clear boundaries like these—even if there isn't *really* a deadline by which the tasks need to be done—give us a nice, neat structure to work within that makes it easy to set time-bound goals and get stuff done.

## A Project Creates Something New

You're doing it now because you haven't done it already.

That's not to say, if you're an advertiser, you've never created a mockup for an ad before. But maybe you've never created a mockup from *this* photo shoot, with *this* kind of copy, and for *this* month's magazine of, say, *Women's Health*. You've built mockups, but not like this.

It's not the first advertising mockup to ever be created, but it *is* new information that you want your audience to see. Because you wouldn't spend more time and resources building the same ad twice, would you? Of course not.

## A Project Has Boundaries

Just like that beginning and end we talked about earlier. But let's emphasize the scope again here. The scope isn't just about start and end dates. It's also about:

- all the deadlines for the tasks in between (“milestones”)
- what resources will be involved (what money and from where, whose labor hours)
- what the tangible deliverables of the outcome are.

If you don't get these down first, your project could end up out of control and off the rails, sucking up time and resources like a destructive and unruly Godzilla.

## A Project Has Someone In Charge

Who asked you to do this project? Your immediate supervisor? Your cofounder? Or did you decide *yourself* that this project needs to get done?

Whatever the case, there needs to be someone in charge, someone the project leaders can hold themselves and their team accountable to. Someone somewhere is personally invested in this project, and we're going to make them proud. (Even if the person is ourselves!)



- **Even if “Project Manager” isn’t in your job title, you could still be one**
- **A project is a set of tasks grouped together by a common goal**
- **A project has boundaries, creates something new, and has someone in charge**

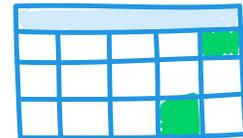


# Do you have what it takes?

Usually project management isn't about just doing one thing right, but succeeding in lots of little areas to motivate others, keep tasks moving and managing all the unknowns for the project to reach fruition.

## 1. Master the Schedule

Yep, time management. Even if there are no real, hard deadlines, make some. Create your team's schedule and stick to it.



## 2. Delegate

Another word for it? Prioritize. Because even though you sometimes want to do every task yourself to make sure it's done right, we just don't have time for that.

## 3. Get Organized

You know the drill. A tidy desk is a tidy mind. A clear-cut project plan aids in success.

Use a project management tool to keep all the information that'll go along with your project organized. (More on PM tools later.)



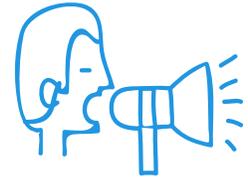
## 4. Manage Risk

As a project manager, you've got to be able to strike that fine balance between being risk averse but also being willing to take the right risks where it counts.

How will you know what the *right* risk is? You won't—that's the nature of risk. But the mental soundness to dissect the pros and cons of risk without getting all frazzled about it will take you far as a PM.

## 5. Lead & Facilitate

Managing meetings, checking in on team members, handling ideas and complaints, and facilitating discussion. *All* of it. Oh—and it doesn't hurt to care about them as people, too. Compassion, communication, conviction—it's all part of being a good leader.



## 6. Negotiate & Beat the Budget

Going over budget is not an option.

Well, it is an option, but the good project manager does whatever she can to avoid it. Kicking off with a budget plan will help this in the beginning; negotiating and getting creative with resources will help during the rest. (More on budget talk later.)

## 7. Be Quick, Be Flexible

A calm swiftness when making confident decisions is the mark of good management.

Be quick and sound in your decision-making; be flexible when things go wrong. Because they will. So be the rock your team can lean on.

## 8. Think Critically

You're emotionally invested in this, sure. But sometimes you're going to have to think over things like you're not. Objective thinking will get you far when you need to take a step back and see the forest for the trees.



## 9. Be Tech Savvy

Technology is having us communicate, lead, manage, and track more efficiently than ever before. Use it. Get comfortable with it and make sure your team does, too. The right tech tools in your toolbox can help your team move mountains.

## 10. Communicate Well (& Often)

Which isn't just about talking to your team. It's also listening, coaching, negotiating, resolving conflicts, and giving feedback.

## 11. Stay Calm, Stay Sane

Keep in touch with your sense of humor—your sanity will thank you for it. Stay levelheaded, stay objective, and don't take failure personally. Your mind will be in a much clearer state to lead that way.



- **It takes a mixture of many traits to succeed as a PM**
- **Manage time, risk, tasks, and your budget**
- **Be organized, quick, and flexible**
- **Communicate**
- **Get comfy with technology**
- **Stay objective, calm, and sane**





## The plan, from start to finish.

Now we're getting into the meaty stuff.

The next few sections will go over each of the 5 phases of a project in depth, so get cozy as we dive in.

## 1. Start

Many PMs call this **Initiation**. Here's where we figure out the big *why* of our project.

What's the purpose? To gather a certain number of leads? To sell a certain number of products? To completely revamp your social media presence?

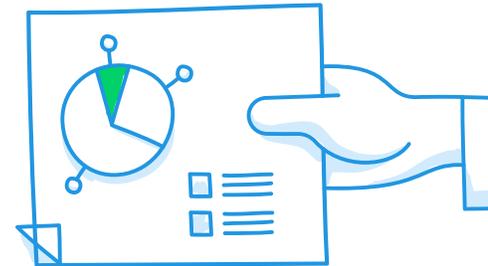
Identify the high-level reasons for your project and the hurdles you might face along the way. Address these goals, fears, and frustrations. We're going to lay it all out on the table in Phase 1.

## 2. Create a Project Plan

Next, we're going to take all that stuff we addressed in Phase 1 and put it in writing (or a project management system).

It'll need to answer questions like:

- What's our budget?
- What tasks do we need to do to accomplish our goals?
- What do we do when we get off track?
- What's the process for making changes and corrections?



We need a detailed plan like this so your team feels supported by a strong foundation, an easy-to-reference road map. We'll cover goals, scope, tasks, scheduling, dependencies, milestones, and deliverables.

## 3. Execute the Plan

Where the rubber meets the road. Your team *must* be invested in the project, so it's time to rally. In this phase, we'll assign tasks and milestones, address dependencies, and get clear on deliverables. We'll get started on the right foot by communicating clearly.

A good PM strikes a fine balance between hands-off and hands-on, sitting back to let their team do their thing while stepping in when needed.

## 4. Watch the Plan

Ah, the best laid plans. Things *will* go wrong, that's no question. The question is: how will we handle it when they *do* go wrong?

In Phase 4 we'll talk about dealing with challenges and changing course. We'll talk about adjusting milestones, the budget, and resources to do whatever we can to keep the project on track.

## 5. Close the Project

And raise a glass.

But first, let's talk about let's make sure our stakeholders are happy with the results. Let's talk about performance reviews, for team members *and* project leaders. Let's talk about what went wrong and what went right so we can take these lessons with us to the next project.



- Phase 1 kicks off the project with purpose and direction
- Phase 2 is all about planning the project
- Phases 3 and 4 will be about project execution and maintenance
- Phase 5 closes out the project with approval from stakeholders and a look back on how things went

## Chapter 4

# Starting Your Project

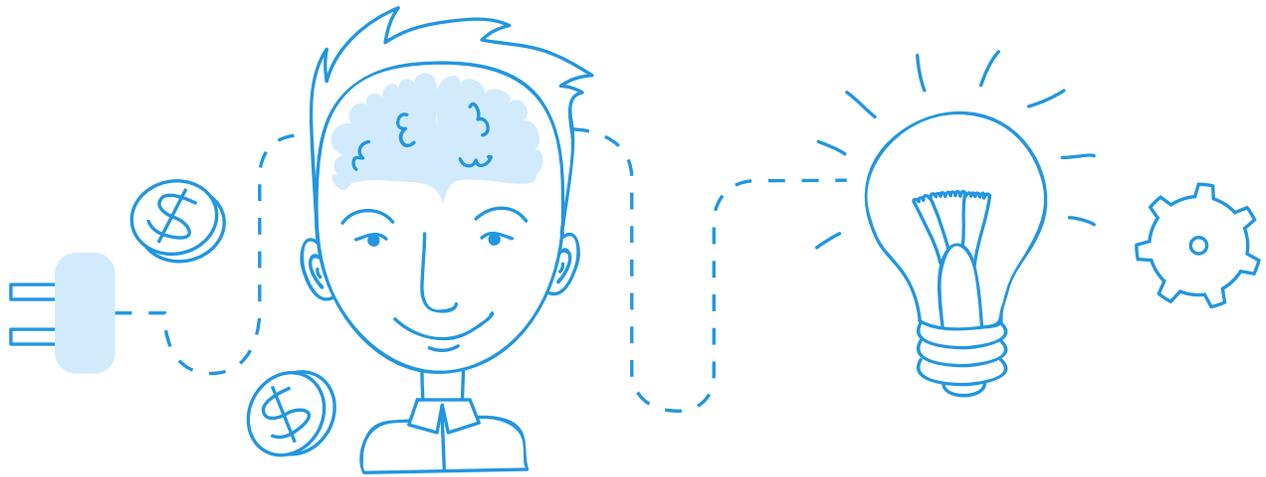




## Phase 1 of 5

You wouldn't embark on a journey without a reason or map. But if you start a project without a plan or purpose, that's essentially what you're doing.

But we can't sit down and write a plan until we know what we want. Until we get the big *why* clear in our minds. Let's talk about discovering that *why* and getting tabs of what resources we have to accomplish it.



## State Your Case

Your business case, that is. You're going to use up company resources for this project, so why do you want to do it in the first place? Why is it worth it? What's your case? First we'll figure that out; from there we'll be able to materialize some objectives.

### Purpose

Your purpose, your case, your big *why*—it's all essentially the same thing here. You'll probably have a **what** followed by a greater **why**. It could look like this:

- **Design and submit an ad** (what) to run in Women's Health Magazine; to **increase brand awareness** (why) among a certain type of potential customer
- **Create an app** (what) that will share company information; **to position your company and department** as helpful and service-oriented
- **Completely redesign your company's website** (what); to **show your customers you're tech savvy** (why), **to make sure they have a pleasant experience** on your website (another why), **to foster positive brand association** in your readers' minds (*another why!*)

Or it could be something totally different. As long as you've got the big *what* and *why(s)*, you're good to go so far.

## Gather Materials

While we're on this first step, go ahead and gather any materials you can get your hands on that might have anything to do with the project so far.

If it's a project resulting from a recent sale by an account manager in your company, get as much information as you can from that deal closer. They've done a bit of footwork so far in the selling process, so let's use what they've got already.

You'll want to ask for:

- **the Statement of Work (SOW)** - the document your deal closer likely used in the closing process to nail down specifics about goals and deliverables
- **a draft schedule** - it's likely they've talked deadlines already, so use this as a starting point to bang out your project schedule
- **a draft budget** - to quote the customer, your deal closer likely had to come up with some kind of draft budget. We'll talk about using this more below.
- **any other information you can get on the client/biggest stakeholder** - what are their likes and dislikes? Does your deal closer have any notes on their quirks, pet peeves, style, or expectations? Do they have any wireframes, mockups or sketches you can have?

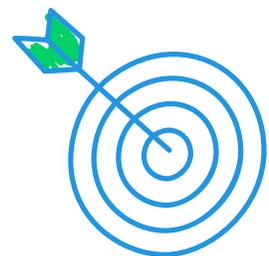
If there's not a deal closer in the picture, find the most knowledgeable person instead, which could be the customer (if you're working with them directly) or your supervisor. The biggest stakeholder—that's your guy.

Gather *a l l l l l l l l* this stuff. We'll be using it below and referencing it throughout the project. (This is where that **Stay Organized** trait we talked about comes in handy!)

## Goals

Now we'll be able to come up with our goals, which should be S.M.A.R.T.—**specific, measurable, attainable, relevant, and timely**.

The **measurable** part is what a lot of people have trouble with. Make sure your goal is quantifiable, which means you can reword the goal in the form of a question and give a definite **yes or no answer on whether or not your team achieved it**.





Let's take an example.

If we *are* wanting to create an ad campaign specifically targeted towards readers of Women's Health, and we're selling a multivitamin for women, a not-so-S.M.A.R.T. goal might look like this:

*We will create an ad to run on the Women's Health website so we can gain lots of new customers.*

What's the problem? Well, it could be more specific in describing the purpose of the ad. It's not measurable, that's for sure. "Lots of new customers?" You can't ask yourself, at the end of the project, "Did we gain lots of new customers?" with a yes or a no. We need numbers.

Let's try this instead.

*We will create an ad campaign consisting of 4 different ads to be used on the Women's Health website so we can increase brand awareness, educate readers about the importance of taking multivitamins, and increase online traffic by 20% in 2017.*

Ah, much better. You'll notice there's one what and a few whys, and that not all of your whys will be measurable. But there needs to be at least one—here, it's to increase traffic by 20%, which is something you can give a definite yes or no on at the end of the project when you're asked if you've hit your goals.

Next you'll break down your goals into small parts and figure out what tasks need to be done to check off each part, but we'll talk about this more in Chapter 5.

## Address Restraints

There's 3 big kinds of restraints we need to be worried about: **budget** restraints, **resource** restraints, and **time** restraints. You should have gathered all this information from your deal closer, customer, or supervisor already.

We're going to hammer out this stuff more later, but for now, the biggest thing we need to worry about is this:

*At a glance, and with the given budget, resource, and time restraints, is this project doable? Are our goals attainable?*

Because if not, we've got some negotiating and re-planning ahead. Don't kick off your project in a bad place by trying to tackle something with, say, half the resources you'll need, or half the time you'll need.

Take a look at how much funds are available, how many labor hours you can afford, and what the deadline for the project is. If it all looks doable, great—we're moving on to the next step.

If it's just too unrealistic, it's time to have a talk with your supervisor, customer, or deal closer. What's a reasonable budget, and how do we get it? Will we have to make sacrifices to use less resources? Will we have to narrow our scope to match our abilities and resources?

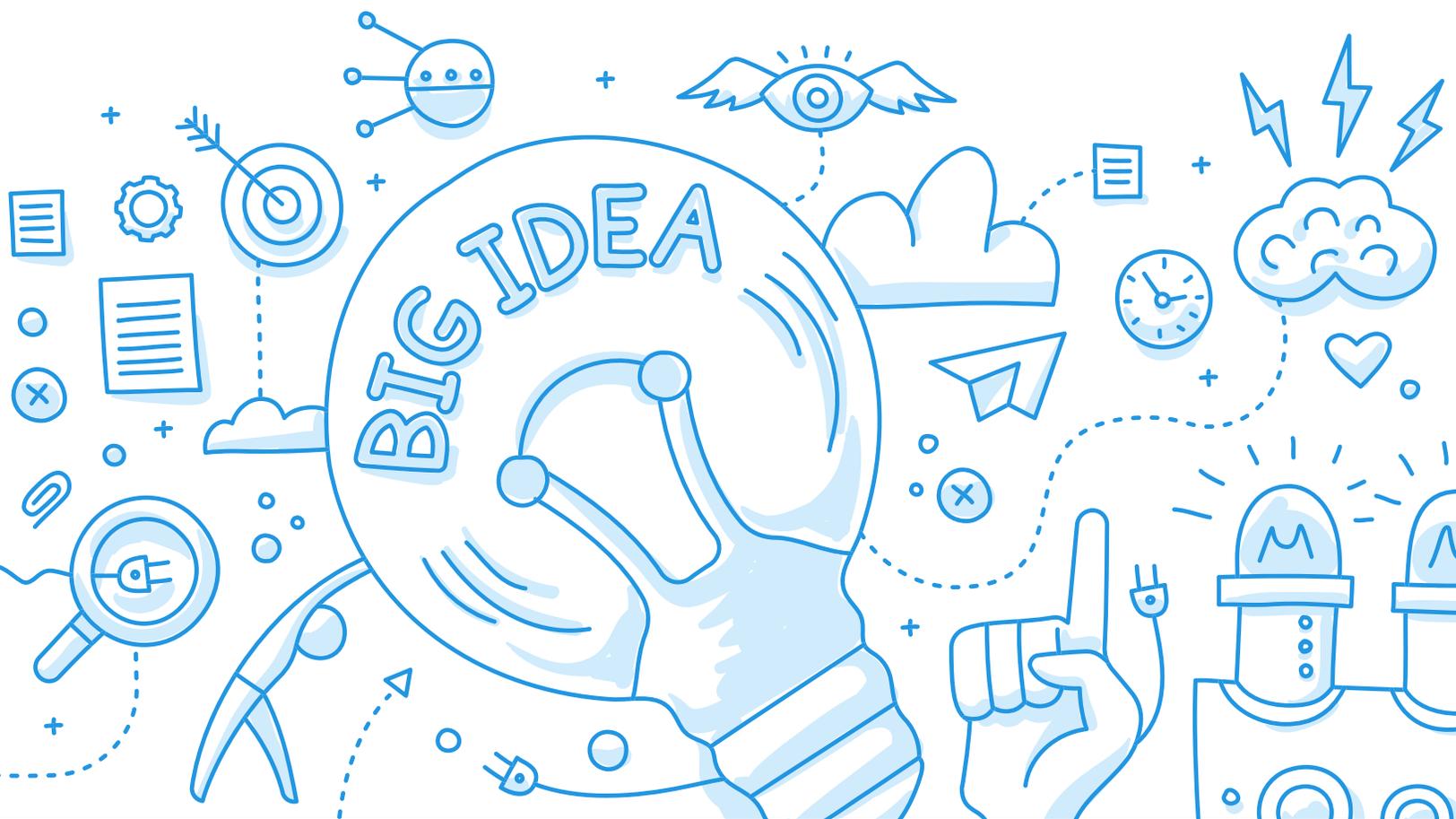
Figure this out now and you'll get to keep your sanity later.



- **First you'll state your business case, your project's big purpose**
- **You'll need to gather materials from stakeholders**
- **You'll also need to set S.M.A.R.T. goals**
- **Before diving in, address budget, resource, and time constraints and make sure they're reasonable and manageable**

## Chapter 5

# Creating a Project Plan





## Phase 2 of 5

Let's create a plan first, because as good project managers (even though we're still learning!) we know that a plan is important. Even if we don't always follow the plan to a tee, even if things get off track, and even if we have to adjust mid-course—having a plan to act as home base will help manage the risk inherent in starting a new project.

## The Buy-In

Lots of projects fail. Know what kind of project fails less often? The kind where team members **take ownership of the project**.

Encourage ownership by:

- **Listening** to your team members and making them feel heard and appreciated
- **Delegating tasks clearly** and specifically so each team member knows exactly what they're responsible for
- **Facilitating discussion and understanding** between departments/project parties that might feel at odds with one another (i.e. in our Women's Health ad campaign example, we'd need to smooth out any artistic vision conflicts between our campaign manager and photographer)
- **Making support processes clear** so your team members know exactly what to do when a problem arises
- **Being adaptable** and giving your team the tools and room they need to succeed

Remember in Chapter 2 when we talking about being a good leader? That's what facilitating ownership is all about.

## The Big Stuff in Your Plan

Your plan should answer questions like:

- What's our goal?
- What's our budget?
- What tasks are needed to complete the project?
- When will we finish the project?
- How will we handle edits or changes?
- How will we track progress and evaluate results?



But when answering these questions, keep in mind that there's a certain set of characteristics that all good project plans have, like:

- **They're results-oriented** - remember our discussion about *measurable* goals?
- **They're vertical, not horizontal** - Good project plans flow vertically, meaning many people can be working on many different tasks at once. Even if your tasks are dependent on one another, find things within the project that others could be doing.
- **They don't last forever** - because after a while, things start to drag on and morale becomes a problem. Stay sharp and motivated with a project plan lasting no longer than a year—or if you can, 100 days or less.

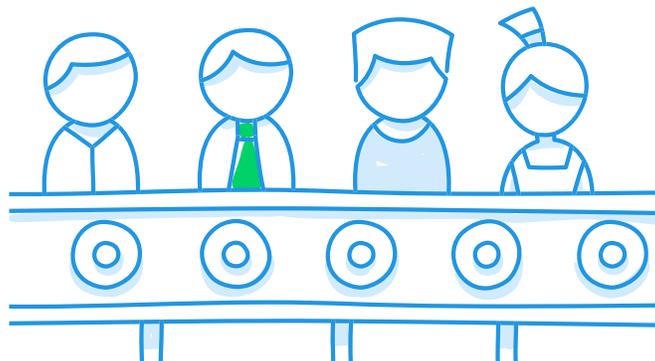
## The Work Breakdown Structure

Ah, the ol' WBS. We're really getting into project management lingo now. What is it? Why don't we just ask [The Project Management Body of Knowledge](#), the classic guide on project management:

*The Work Breakdown Structure is a deliverable-oriented hierarchical decomposition of work to be executed by the project team.*

Without the fancy wording, we can just say it's a list of tasks, which team member those tasks are assigned to, dependencies among those tasks, and the deliverables that will be the outcome of each completed task.

As long as it includes this info, it doesn't have to be anything fancy. But project management software makes tackling the WBS super easy.





## The Meetings

Let's schedule all those meetings now. *Now?! Yes, now. All of them? Yes, all of them.*

Use your list of milestones and deadlines (you know, the info from the Big Stuff in Your Plan) to get create a schedule for your team meetings *now*. That way you'll all be held accountable and know exactly when you need to be ready to come together and talk progress and next steps.

Schedule a kick off meeting for the beginning, a performance review meeting at the end, and check-in meetings to correspond with important milestones in between.

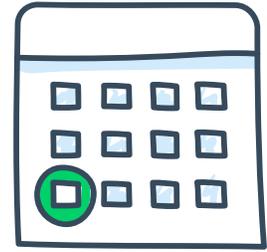
## Communication

Let's get the channels of communication straight. How will information flow? What's the process for handling concerns, complaints, new ideas, changes, or edits?

A team member should know exactly who to get in touch with, and through what channel, as soon as she realizes she needs to speak up about something. An open-door policy is a must for successful projects.

# The Schedule

Not just for our meetings, but for—well, everything. We're talking deadlines here, folks.



It may feel like a big scary word, but having a motivating yet attainable schedule makes it a little less scary. Group your tasks into milestones and set hard deadlines for each of these. Budget your team's labor hours and make sure these estimates match up with estimated task duration.

Basically, make sure effort required of team members equals the duration of project.

# Resource Management

Speaking of labor hours. We'll need to allocate all our resources, which means we'll need to figure out:

- How to budget our time
  - Where will labor hours go?
  - Whose labor hours will go towards what tasks?
  - How much of the budget will be allocated towards the cost of labor?
- How to budget the rest of our funds (excluding labor hours)
  - What expenses will we incur?
  - Will we be hiring outside help or consulting?
  - Will we be able to afford everything we need to get the job done?
- How to get anything else we need
  - What resources do we already have at our disposal?
  - Do we have everything we need to hit our goals?
  - What if we don't? Do we need to renegotiate the budget or stakeholder expectations?

It's a lot, I know. There's a lot of math, money, and human capital involved—another great reason to use a template or project management software when planning your project.

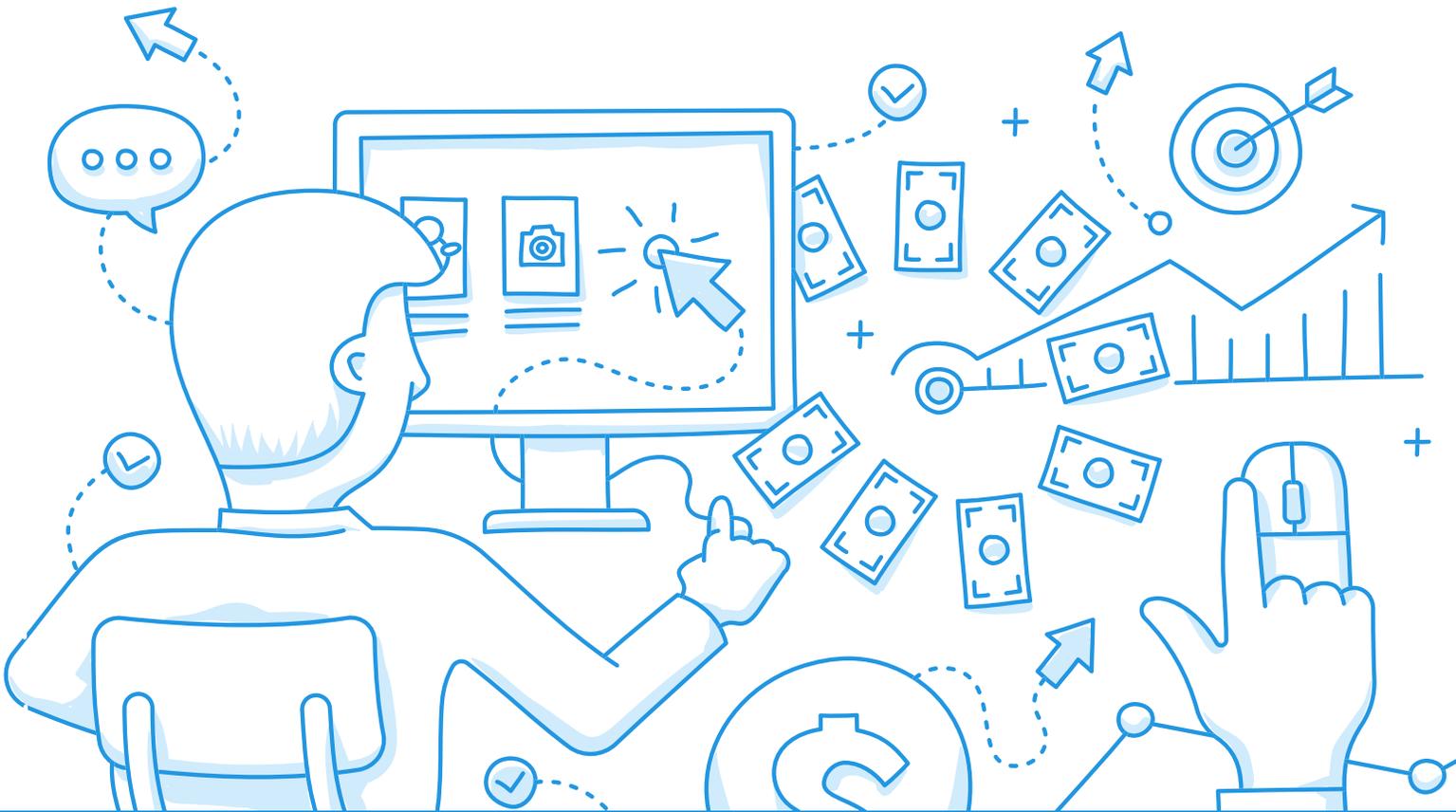
However you do it—by spreadsheets, by software, by *hand* on pen and paper—just do it. Extra time spent here can help make things much clearer down the road.



- **Get your team to buy in to the project and take ownership**
- **In your project plan, answer the important questions and keep the characteristics of good project plans in mind**
- **Break things down into tasks with the WBS**
- **Lay out your team's schedule and get clear on channels of communication**
- **Budget all of your resources (labor, time, funds)**

## Chapter 6

# Executing the Plan





## Phase 3 of 5

Now we're really getting into the good stuff.

On one hand, now's the time you can relax a bit, because you've done all the hard, up-front work like figuring out what needs to be done and assigning those tasks to your team. A lot of times, just getting started is the scariest part. But having a plan takes a lot of the guesswork out of it and should make you and your team feel a lot more comfortable.

But at the same time, you can't relax *too* much, because you've still got a team to lead and a project to keep an eye on. It's a fine balance to strike between stepping back and letting your team do their thing, while at the same time, making sure everything stays on track.

Let's talk about what you should be doing to make sure things go smoothly during execution.



## Managing Your Team

For a lot of project managers, it's not about managing projects, really. In the grander scheme of things, it's all about managing people. Keep these management tips in mind when you kick off your project.

### Setting & Managing Expectations

We've talked about setting up the right channels and processes for communication, but here's where you need to walk the walk. Setting and managing expectations about communication among your team is a huge part of being a good leader.

For the sake of efficiency, stick to agreed-upon communication processes yourself and urge your team to do the same. And if you ever find yourself or perhaps your team straying from proper communication channels, don't sweat it *too* much—just remember, an open-door policy is the best communications strategy. As long as we're communicating, we're golden.

### Listening & Being Open to New Ideas

I know we've talked a lot about the importance of a project plan, WBS, Statement of Work, and all these other handy reference documents. But remember this: **these guidelines are not set in stone.**

Things change. People have new ideas. And if a team member has a new idea that doesn't exactly jive with the current project plan but may help make things run a bit more smoothly, it's worth a listen. (Unless it means a creep in scope, which we'll talk about more below.)

## Being Compassionate & Caring About Humans

I say “care about humans” because “care about your teammates” is not quite the message I’m trying to get across. They’re your teammates, yes, but they’re humans first.

These guys and ladies have families, personal goals, personal problems, good days, and bad days. Sometimes they spill coffee on themselves on the way to work and have a case of the Mondays. Sometimes they didn’t realize they put their pants on backwards until they got to work that day. (Don’t ask me how I did this and please don’t tell me I’m the only one.)

Care about the humans first. Because *I want you to succeed in your project*, I really do—but I also want you to remember this: no matter what, it’s just work. **It’s just work.** And the connections you have with the humans you live and work with every day will always be more important than work.

Really care about them and they’ll feel it. Do this and the good work will come.

## Reporting with Your Team

Let’s talk about meetings and I’ll try not to get heated. Because if you’ve ever sat through a meeting that just seems to drag *on and on* or that has no real agenda you’ll understand where my rage is coming from here.

### Meetings Are Reporting Mechanisms, Not Torture Devices

Here’s what you need to make your meeting successful. It’s only 2 things. Just 2 things, and I promise you, it’ll be nice and effective and breezy.

It’s very simple. For every meeting you have with your team:

- you absolutely **must have an agenda** that comes with a set of clear objectives for the meeting, and
- you really, really, really should have **an end time** for your meeting.

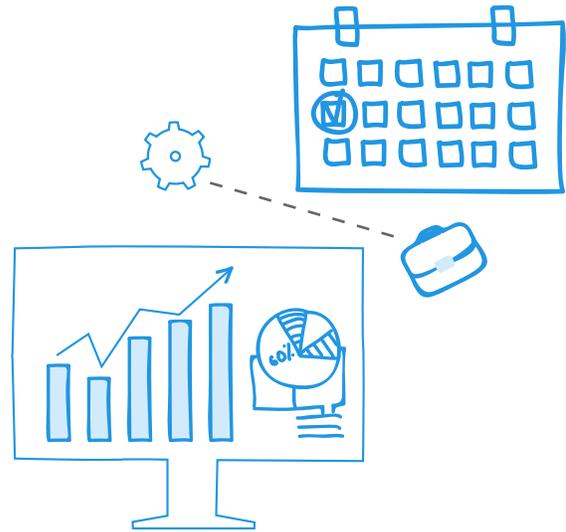


Please don't make your team suffer slow deaths by meetings. That's what the cut-off time is for; we know we need to move along with our discussion when Jim is falling asleep because he's hungry and bored because our meeting has romped around wildly straight through lunch time and we're all so cranky we're not even paying attention anymore.

Get things under control with an agenda that should include:

- **Clear objectives** - the stuff that *must* get done in this meeting
- **Talking points** - a list of things you need to address with your team
- **Reporting schedule** - a portion of the meeting set aside specifically for a progress report from each teammate
- **Next step instructions** - ask your team: are we ready to start the next section/milestone?
- **The start and end times** - so we stay on track (all hail timeboxing)
- **Open floor time/questions** - to encourage open communication and for addressing concerns

Because the more efficiently we get through this meeting stuff, the more time your team has to spend on the nitty gritty.



## When the Schedule Changes

What happens if, during these progress report meetings, you realize some parts won't be finished on time?

The other thing that's so important about that open-door policy we keep talking about is that, hopefully, it'll encourage your team members to come forward with information on late work so you can find out about it as soon as possible.

That should be another communication policy with your team: ***If a portion of work is going to be late, I need to know about it as soon as possible.***

That'll give us more time to figure out what to do. Here are our options:

- Revisit the project plan and see if you can cut out some slack anywhere else to compensate
- Get team members who are ahead of schedule to help speed up progress on the late or soon-to-be-late task
- Roll up your sleeves and do whatever you can to get the task done yourself
- Hire outside help to speed things along if you've got the room in your budget
- As a last resort, talk to stakeholders, brief them on the situation, and ask if you can adjust the project timeline.

Whatever you decide to do, take a few deep breaths first. Act calmly, rationally, but also swiftly; most of the time, things'll turn out okay if you can get through this speed bump.

Note this instance of late work and put it in your back pocket; at the end of the project we'll need to address problems like these and figure out why they happened in the first place.

# Using Project Management Software to Eliminate Hassle

Some people use Excel spreadsheets for managing a project, which—considering all the things you need to keep track of—can be really complicated and bulky. Math and numbers people have Excel; thankfully, we have project management tools.

Project management software does everything a spreadsheet can do and more, and it does it in a *waaaaay* more user-friendly way, too. Even Microsoft doesn't seem to want you using Excel for project management; they have their own Microsoft Project for that.

But there's a ton of options out there so be sure to do some research first.

Whatever tool you choose, make sure you'll be able to:

- See **dependencies** (Gantt chart functionality is perfect for this)
- Stay on top of **resource allocations**
- Track **budgets**
- See **what everyone is working on**
- Gather and save **reports**
- **Edit and track changes** on files
- Use **comments** and **notifications** for staying in touch (this makes figuring out standard communication channels much easier!)

It also wouldn't hurt to have:

- **App integrations** like Google Drive, Slack, and Salesforce
- A reliable **support team** you can turn to when technical issues arise
- **Image markup** for easy collaborative sketching/instructional screenshots
- Smart **to-do lists** that give a focused, cross-project view of the day's work
- **Project templates** and **project intake forms** so you don't have to reinvent the wheel every time



## Managing Scope & Avoiding Scope Creep

Scope creep is kind of like a scary clown hiding in the woods behind your house. You won't know he's there right away and often by the time you see him it's too late.

All scary scope creep wants to do is steal resources from your budget and suck the souls out of your team.

Your greatest defense against scope creep is a solid project management tool. In non-clown terms, one might say:

***Scope creep** refers to any **expanding or changing** of the project's scope that occurs after the starting point of the project, almost always **requiring more resources and labor hours** than originally planned.*

Remember when we talked about your purpose and goals in **Phase 1: Starting Your Project** (in Chapter 4)? Basically, work that falls outside this purpose—any work that wasn't originally discussed in the planning of tasks and milestones and that isn't absolutely necessary to achieve the original goal—is work that's considered scope creep. And scope creep is no good.

You can avoid scope creep from the beginning by making sure your plan is detailed enough that you're able to get a realistic picture of what needs to be done. And it doesn't hurt to do a bit of contingency planning, either.

If you're already in the middle of a case of scope creep, you have a few options for getting back on track. Start with addressing *why* the scope creep is happening, then from there:

- If the scope creep is the result of **a team member getting a little overzealous** about showcasing their abilities with this project, help bring them back down to earth by encouraging them to “play” on their own time or after this project is done and gently urging them to get back to the necessities
- If the scope creep is a result of **the client tacking on more work** to the project, kindly remind them about any contracts or SOWs you've both signed, which should clearly outline the scope of work, and assure them that you'll be happy to take on more work with them on a new contract once this project is finished
- If scope creep is the result of **a misunderstanding during the planning phase** of the project (i.e. you didn't realize how long a certain task would take, or that completing a task might rely on another task you didn't originally include in the scope of work) consult with your team on how you might be able to pick up the slack and still meet contract requirements, or explain the situation to your client and ask if you can adjust contract terms like scope and payment

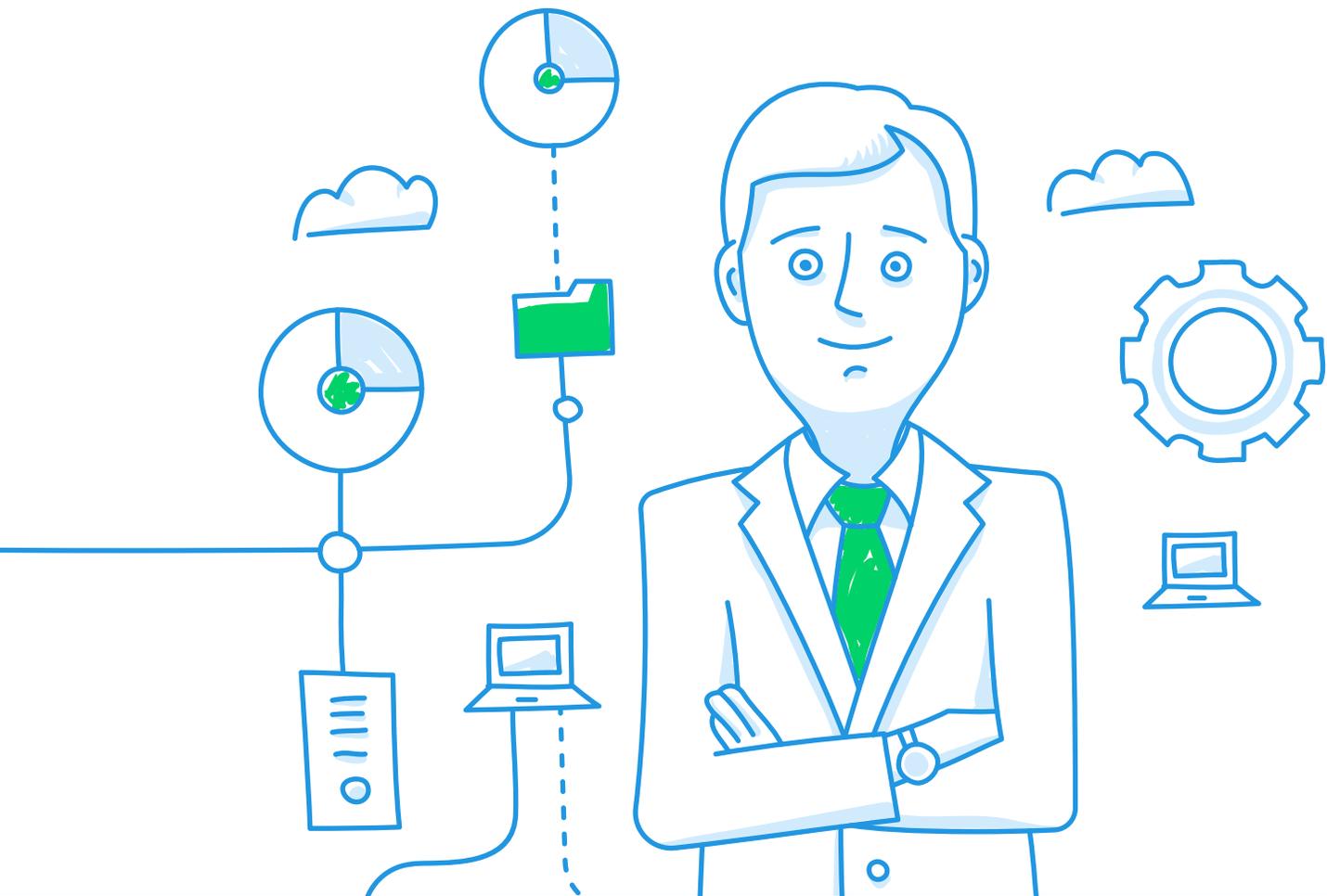
I know, it stinks. No one wants scope creep. But the sooner you spot it, the sooner you'll be able to mitigate the damage done by scope creep.



- **Being a good PM means taking a step back and letting your team do their thing, but also making sure the project is running smoothly**
- **A big part of managing your team is setting expectations, listening to new ideas, and showing compassion**
- **Meeting agendas and an open-door policy about tardiness are musts for efficient reporting among your team**
- **Using project management software can take a lot of hassle out of reporting**
- **Scope creep is when a project goes off the rails and doesn't align with the work outlined in the project plan, but keep an eye out for it and its effects can be mitigated**

## Chapter 7

# Watching the Plan





## Phase 4 of 5

Another cue that you're secretly a project manager? You'll often find that once a project gets going, your workload changes from planning to almost purely managing. Your task load shifts from being concrete and practical to-dos that need to be crossed off to this big, nebulous thing that is taking care of your team while they have their turn at the task-driven work.

Hopefully you're not assigned too many project tasks yourself so you can focus all your attention on watching the plan unfold and managing your team.

That's why most of what we need to cover here has to do with communication and expectations, whether it has to do with your team or elsewhere.



## Regular Communication

Here's another way project management software makes your life way easier. With a good PM app, you'll be able to:

- **Schedule meetings**, notify your team about them, and upload meeting agendas and post-meeting summaries
- **Save and edit documents** all in one convenient place
- **Chat with your team** and leave comments and feedback on tasks
- Know the **status of every task**, getting an accurate snapshot of progress at any point in time
- **Review work** and notify a task owner of a task's approval status (i.e. is a task completed to satisfaction or does it need changes?)

See what we mean when we say you should use a project management solution? It's kind of a lot to get a handle on, and relying on a lot of different tools at once (that weren't made for project management in the first place) like Word, Excel, emailing, and pen and paper is just asking for a panic attack.

What's the #1 reasons projects fail? Lack of communication. So if you get any one takeaway from this whole guide, let it be this: communicate. Do whatever it takes to communicate in a way that's best for you and your team, whether that involves trying new PM software or not.

# Risk, Resource, & Non-Team Member Management

We've talked about managing our team as a whole; now let's talk about managing everything (and everyone) else.

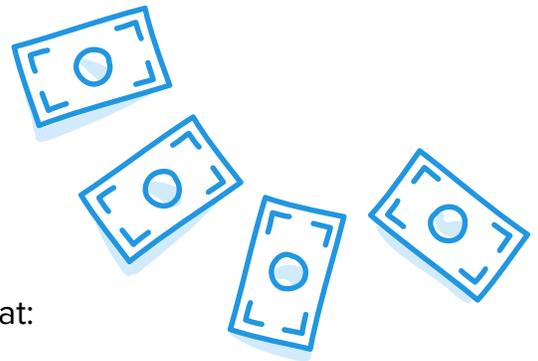
## Risk

Hmm. What can we say about managing risk? It's a tricky topic that's been the center of countless books, seminars and management studies. While we can't get too far into how to manage risk, we can point you in the right direction.

- If you're looking for a **traditional textbook guide** on managing risk, try [The Fundamentals of Risk Management](#).
- If you're looking for **more modern takes** on risk, try skimming [The Essentials of Risk Management](#), [Eat People](#), or [The Innovation Playbook](#).
- **If you're an extreme introvert** and consider yourself prone to **staying in your comfort zone** (when it comes to leading your team or making big decisions), check out [Riskology](#), a project out to teach leadership and risk-taking to introverts.

In the meantime, some best practices for risk management are:

- To **identify and discuss risks early** on in the project
- **Explore pros and cons** of taking the risk and not taking the risk
- Depending on the type of risk, you can **use data and statistics** to evaluate your risks on a logical level
- **Use both objective and subjective thinking** when it comes to figuring out what risks to take (use your head *and* your gut)
- **Track risks and outcomes** so you'll be able to bring this knowledge with you to the next project (which is much easier to do with project management software)



## Budgets & Timelines

Managing your budget and timeline is a lot like risk in that:

- You should be on the lookout so you can **identify problems as soon as you can**
- You should **use both objective and subjective thinking** to determine whether or not you're really on track or if you need to correct course
- Project management software makes all this **tracking and adjusting** way easier

It all comes down to this: **watch, communicate, course correct.** That should be the PM's credo when it comes to managing budgets, risk, and timelines.

## Personnel & Stakeholders

Managing stakeholder expectations is just as important as managing your team. Whether that stakeholder is a customer, account manager, investor, or your supervisor, there's a few things you can do to manage their expectations about a project and keep everyone on the same page.

- **Engage** stakeholders - by staying in touch about project progress and listening to what they have to say
- **Be transparent** with stakeholders - by making sure the SOW and project plan is easily accessible
- **Address concerns** from stakeholders - politely, calmly, and as soon as they arise, so you can ensure your project is in line with their expectations and address any disparities if it's not
- **Avoid overhyping** deliverables - since a huge part of managing expectations is under-promising and over-delivering, so don't promise your stakeholders a level of quality you're not 100% confident you'll be able to deliver

Have we said it enough yet? If the marketer's slogan is *location, location, location*, ours is *communication, communication, communication*. It's a mouthful, but no one said it'd be easy.



## Team & Role Management

Let's get a little more specific about managing the people who do the work, drilling down by tasks and roles. So now we're not so much talking about the big bird's-eye stuff we discussed in Chapter 6 like caring about your team as humans as we're talking about managing on a task-by-task scale.

## The Project Leader & Her Role

You know the allegorical phrase that says anything with two heads a monster? I tend to disagree, but in project management situations, it might be a good philosophy to keep in mind.

Here's what I mean. Who is your executive sponsor for this project? Who is the real head honcho, the project leader? Is it you or someone else? Whoever it is, make sure you know which person has the final say in task approval.

This is called **role management**—or knowing whose opinion counts where. Use lots of heads to make the project happen, sure—but only one head can make the final decisions.

## The Team & Their Roles

Division of labor and delegation is a wonderful thing and almost always helps a project get done more efficiently. Keep an eye on the roles your team members are filling and make sure they're matching up with the tasks they've been assigned.

Clear up any confusion about team member roles and task scope as soon as you can so everyone knows exactly what they need to do to take responsibility for their portion of the project.



- **Ongoing communication is necessary and especially simple with a project management app**
- **You've got to be able to balance managing risk, your budget and timeline, and stakeholder expectations**
- **Part of managing your team is figuring out who gets the final say in what situation and making sure your team members are acting within their assigned roles**

## Chapter 8

# Closing the Project





## Phase 5 of 5

At this point, we'll either be popping bottles in celebration or emptying bottles with despair. Let's hope it's the first one. No matter how successful (or not-so-successful) your project turns out, it's time to close things out with a look back.

# Closing Out Tasks

Here are a few things you'll need to do before wrapping it all up.

## Customer Issues

These tasks are ones that'll make sure your customer is all set to benefit from the fruits of your labor. This might include tasks like:

- Complete all deliverables
- Install and test deliverables
- Prepare any manual/how-to materials
- Agree on level of follow-up support
- Verify customer satisfaction



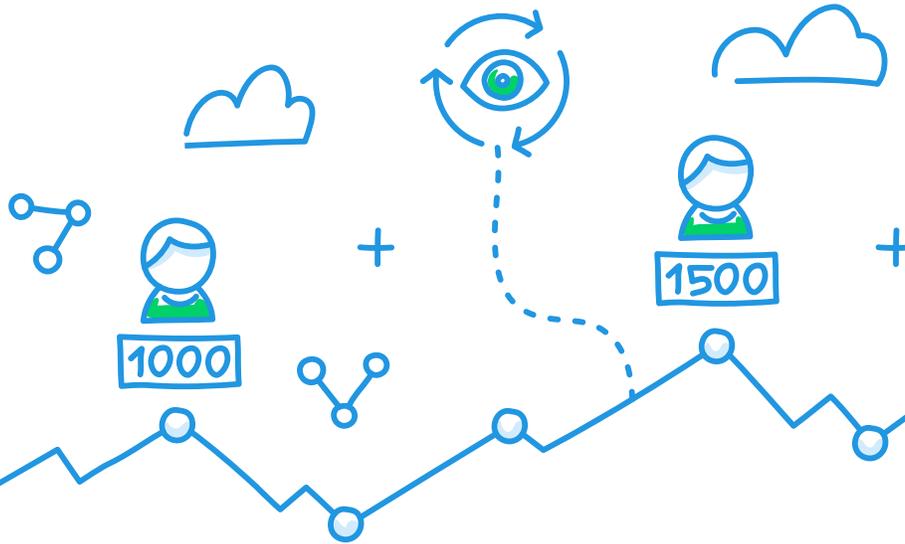
But you won't always need all of these steps. For our Women's Health website ad, for instance, it might just be getting the ad tested on the Women's Health website and collecting reports on engagement.

## Organizational Issues

This stuff's a bit more internal. This is where we'll do most of our reflecting on how all the parts of the project came together.

- Summarize learnings – communicate to the organization
- Prepare final technical reports
- Evaluate project performance
- Conduct final review with management
- Prepare project historical files and archive

We'll study the financials from our project, evaluate the ad's performance, and file this information neatly away so we can refer to it later when similar projects pop up.



## Personnel Issues

How did our team perform and where will they go next? That's what this section's about.

- Recognize/reward team performance
- Write performance evaluations for project team
- Assist in reassignment of project personnel

For our Women's Health ad, it might look like this: 1) Recognize Wendy's hard work in making sure the ad got turned in on time even though the team fell behind schedule and she had to pick up the slack; 2) evaluate performance of all team members; and 3) help employees and supervisors figure out where to go next.

## Administrative/Other Issues

Now we're closing the books and wrapping it all up neatly.

- Dispose of leftover project material
- Close down temporary site operations
- Submit final invoices
- Forward all final payments
- Close out project charge codes and work orders

For our ad, it might just be submitting the final invoices and collecting payment.



## Take Some Time to Reflect

Work through this reflection process by yourself and then with your team.

Ask yourself and your team questions like:

- **What went right?** What went wrong?
- **Where did we overestimate?** Underestimate? What assumptions led to these incorrect estimations? How can we avoid making the same assumptions in the future?
- **Did we go over our budget?** Or did we stay under? What tasks used up more of the budget than planned and why? How did we have to handle going over-budget (i.e. what sacrifices had to be made and where)?

Talk it out. Hug it out, if you need to. Just remember that we're not done yet. This reflection period and the review document we're about to make is just as important as project execution.

# Use This Info to Create a Review Document

Talking it out is nice and cathartic, but in order for this to be an experience we can learn from and use on our next project, we need to record and track this feedback just like everything else we've been tracking so far.

It doesn't have to be anything fancy, but you really should create a **Project Review Document** that'll address:

- **Successes** - what are 3-5 specific things that went right and who was responsible?
- **Challenges** - what are 3-5 specific things that went wrong and where did we fall short?
- **What can we do better next time?** - in clear and specific terms on what to do differently in the future
- **Did we reach our goals?** - did we fulfill our project's purpose? Or did we miss the mark?

This is just as important as all your other project management files, so it should be professionally written and filed away just like all your other important PM materials.

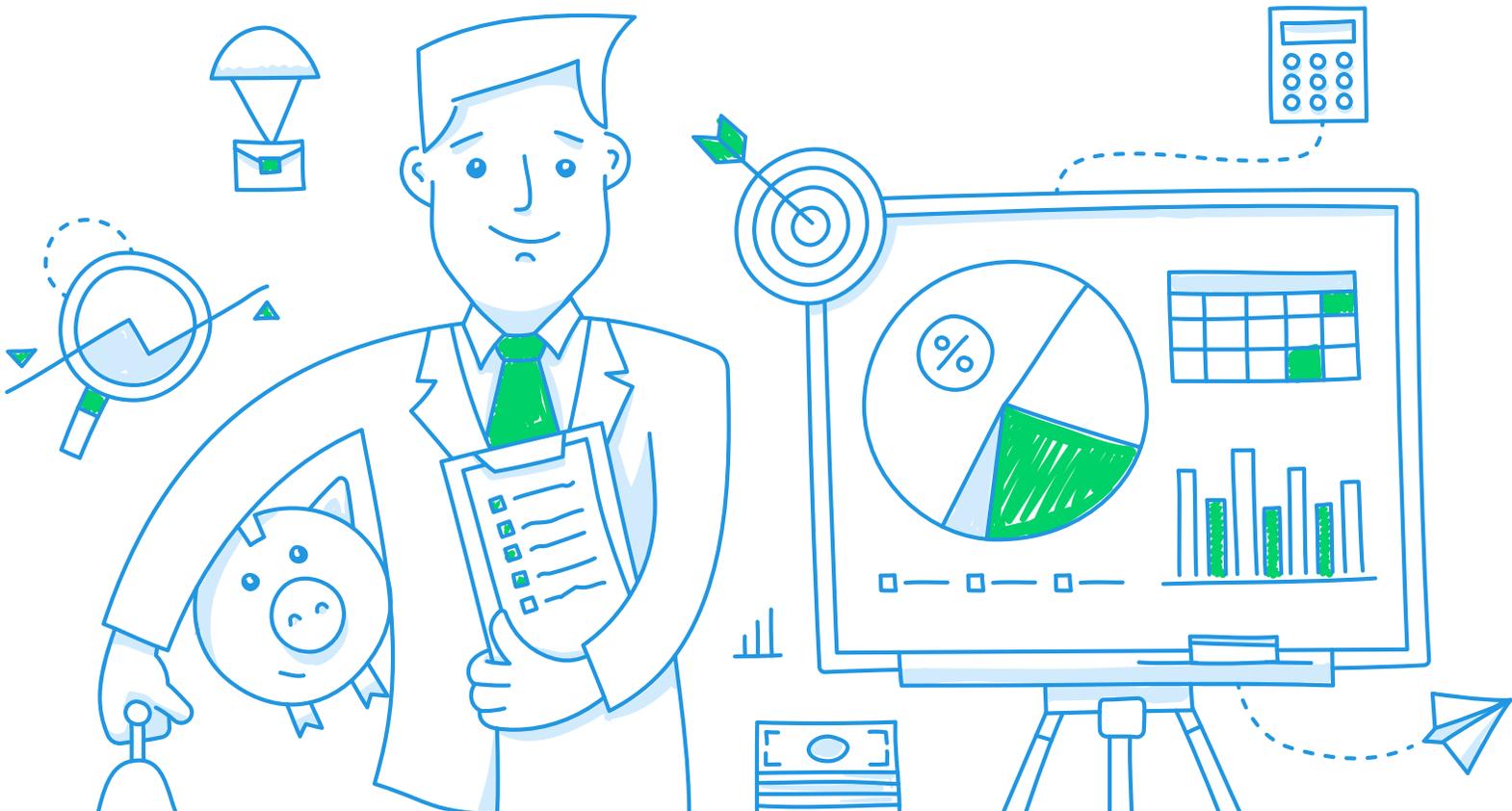
Thinking these things out and getting them down on paper is also a great way to be transparent with your stakeholders about the success of your project. It shows them that you're personally invested enough to take a moment and examine your own performance. Even if you didn't accomplish your goal 100%, a thorough and honest performance review says a lot about your strength as a project manager.



- **Work your way through a closing-out task list so you make sure you're ending your project neatly and thoroughly**
- **Take some time to reflect and talk out the issues that arose during your project**
- **Create a review document that addresses and dissects these problems so you'll be able to use this knowledge on future projects**

## Chapter 9

# What We've Learned

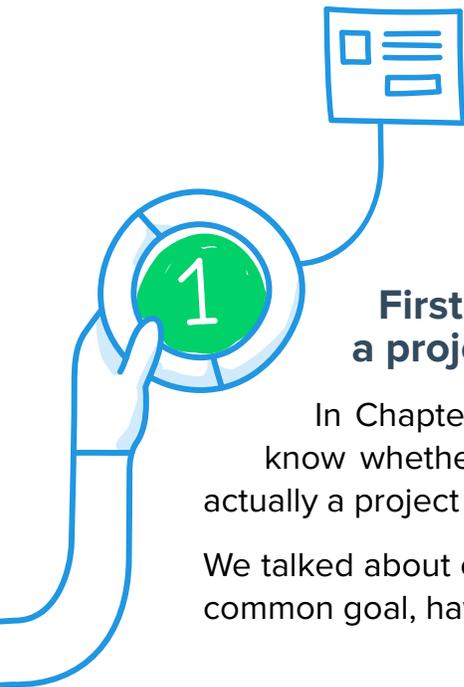




## Starting, finishing, and everything in between.

Whew! Now we're *really* done. No more reporting and reviewing and reflecting and all that tough brain work. Grab the champagne. Pat your team on the back. Take them all out for a blooming onion. Do whatever it is you do to say thanks, because no matter how the project turned out, I'm willing to bet you and your team worked your tushies off.

Before we sign off, let's review, shall we? Just to make sure we've covered all things project management from start to finish.



## **First, we talked about how you might not realize you're a project manager, but probably are.**

In Chapter 1, we talked about what project management is and how to know whether or not—regardless of what's on your business card—you're actually a project manager.

We talked about criteria for a project, like having sets of tasks grouped around a common goal, having project boundaries, and having someone in charge.

## **You kicked things off by talking about the traits you need to be successful.**

In Chapter 2, we talked about leadership, communication, risk-savviness, organization, collaboration, and negotiations. All the *-ations*, basically.

## **We outlined the phases of a project, then we dove in.**

In Chapter 3, we laid out a roadmap of project phases. In Chapter 4, we talked about all the things you need before starting your project like:

- A Statement of Work
- Info on restraints
  - Budget
  - Time
  - Labor hours
- Any information you can get on the biggest stakeholders
- A clear purpose or business case



## **Then we used all this stuff to write our project plan.**

In Chapter 5, we talked about what you need to include in your project plan and how to get team member buy-in. We talked about the characteristics of a great project plan, which almost always includes:

- A meeting schedule
- Answers to commonly asked questions like “what do we do if problems arise?”
- Guidelines and processes for efficient communication
- Labor hour estimates for project tasks
- A breakdown of how we’ll use our resources and budget

## **And then we actually **STARTED** our project.**

In Chapter 6, we executed. We talked about managing your team, reporting with your team, using project management software to take the hassle out of communication, and avoiding scope creep.

## **And then we kept going.**

We kept a watchful eye over our project in Chapter 7. We kept on communicating, managing risk, and managing stakeholder expectations. We made adjustments on the budget or schedule as needed.

## And then we made it.

In Chapter 8, we came out the other side with more knowledge and experience than before. We talked about this project, what went well, and what didn't. We might have cried, but that's beside the point. We made it.

We also drew up our Project Review Document, because we're real project managers now and we know that's the right thing to do.

## And then we REALLY made it.

And here we are—the conclusion. Now we've *really* made it, as in no more brainstorming and correcting and reviewing (and hopefully no more crying). Let's celebrate what we've done and forgive ourselves and our team for where we went wrong.

Let's just be glad we got through it okay. Because now we're real project managers, and however our project went, we learned something. And as long as we keep on learning from project after project, we'll keep growing and hone our confidence, knowing that no matter what problems arise in a project, we'll come out on the other side okay.





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