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A Guide to Project Management

Written By Brett Harned

About the Author

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Brett Harned is a Project Strategist and Digital PM Consultant in Philadelphia, PA. He has more than 15 years of experience in communications and creative team management serving in roles from copywriter to account director. His most recent role was as Vice President of Project Management at Happy Cog, where he mentored a team of PMs and managed projects for companies like Zappos, MTV, and Monotype.

He began blogging about his adventures in project management when he realized that the perceptions of the positions were just a little off. Since, he has spoken at events like SXSW, written for .net magazine and pmhut.com, taught web project workshops at places like The University of the Arts in Philadelphia, and has led the biggest, most satisfying project of his career: the Digital PM Summit.

When Brett isn't wrangling timelines and budgets in the office, he likes to discover new music, experiment with photography, and explore the City of Brotherly Love with his wife and two daughters.
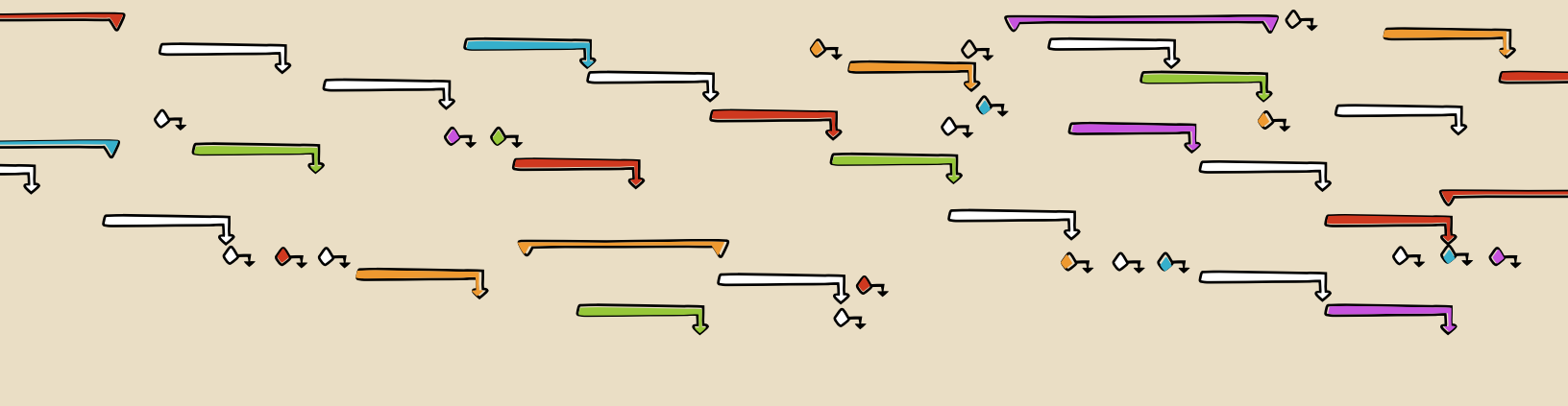
The Good Project Manager

This series is written in partnership with TeamGantt, provider of online project management software.

I t's difficult to define what a "good" project manager is these days. Every organization defines the role, and often the title, differently. Project managers are needed in many industries. As a PM, you might work on small or large teams with job duties that range from budget and timeline only to everything you can think of under the operational sun. Maybe you're not even a project "manager" by title or you work on your own, but you're responsible for managing work. No matter where you stand, there are things you'll need and want to learn as you jump in to managing all of these things. You've come to the right place.

As a PM, you might work on small or large teams with job duties that range from budget and timeline only to everything you can think of under the operational sun.

Creating realistic project plans, estimating time and effort, rocking a spreadsheet your own way... those are all things you MUST do as a good project manager, and those skills are easily learned. In fact, there are some great programs and instructors who teach and certify those skills. But, central to the role is the skill to keep your work organized and your teams informed and happy.

The core competencies of a good project manager are rooted in one's ability to navigate rough and still waters with the same level of effort and ease. It's one part technical expertise and three parts emotional intelligence. Either way, it's not easy to navigate!

This series, written in partnership with TeamGantt, will cover both the soft skills and the hard skills. Look forward to tips on project planning, managing scope and expectations, and more. Before we get into those topics, let's cover the basics. This article covers the roots of what it means to be a good project manager. The writer might not be the best, but has met and hired a ton of great PMs in the field of digital project management.

Communicate Like a Pro

I've never loved the term "people person" but that's because I've never met someone who prefers to communicate with a plant or a dog. Those people are out there. But if they're the PM at your organization, you're in trouble. (Unless maybe they manage your garden?) Anyway, it's universally accepted that good PMs are easy-going communicators who do not flinch at the thought of communicating with others. This means speaking to people in person about a variety of topics-easy and difficult in nature. And not being bashful about open communications, but recognizing the fact that an entire team might not communicate the same way.

It's not all about you and your process as the PM. It is all about you working with the team to come up with a structure that works for everyone.

Be a Chameleon

It's a fact: Any project will fail without solid communications. Being clear, concise, and honest in outward communications is just as important as taking queues on how to communicate with others.

Getting to know the people you work with and understand how they work and communicate is important when trying to motivate a team and accomplish deadlines, or even simple goals. Many times, a PM needs to be a project chameleon to make this happen. Devising a communications plan for your team can be helpful, but forcing a communications structure won't always work for everyone. And that can get tough. **Remember, it's not all about you and your process as the PM. It is all about you working with the team to come up with a structure that works for everyone.** You may ask, why change your communication strategy from project to project? This approach could get confusing for you. Particularly if you're a PMO or are working on several projects with many team members. That's okay, maybe so maybe it won't work for you and you need to follow company-wide standards. That doesn't mean you shouldn't take a personal approach. Think about it: If you put the time and effort into getting to know your team and creating a plan with them, everyone will buy in. In effect, they will communicate in a way that makes them comfortable and deliver on your projects with less effort, confusion, and fear.

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Status!

So what are the foundations of good communications? Status meetings and reports can be invaluable, because you're keeping track of next steps, action items and project risks. Use a weekly status report to stay transparent about budget and process and you'll never have that awkward conversation about needing more time or money to complete your project. There's value in regrouping on a regular basis to talk about what's happening and what the team is accountable for at any time. If you're working with clients, it's a good practice to communicate project details in writing on a weekly basis in a status report. And, if time allows, hopping on the phone to talk through the report will help to reinforce the message and build rapport. Remember, it's never a bad thing to pick up the phone!

No matter what you're doing, just remember that we're all humans. Everyone has their hangups and everyone communicates differently. That said we're naturally built to be communicators. Whether your communication written or spoken through email, phone, instant message, mail, carrier pigeon, you'll find a way to make your point known. As the project manager, you have to figure out how to communicate with the various personality types on your team. You don't have to endure the carrier pigeon if that's not your thing (I mean, why would it be?). You can set the proper expectations, but If you ignore your team's preferences and just do things your own way, you'll find more barriers to success.

Set Expectations and Never Abandon Them

Setting and managing expectations is one of the most difficult things a project manager has to do as a part of the role. Many PMs start projects with several unknowns about goals, budgets, timelines, and most of all level of effort. When you're setting communications expectations with your team, it's a good idea to also cover scope, timelines, and any other details that may play into how you will make a project successful. And, when you're working with a client, it's good to set the same expectations early on.

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Define Scope

Every project's expectations should be set by a well-written scope of work. If there isn't documentation to back up the project request, create it. Not every work environment is formal enough to create scopes for every project. That's okay! But some semblance of a scope will help to provide you and your team guidelines, or expectations of what the team will deliver. Every team should use a scope document to set the stage for what you will deliver on a project. It's a good practice to sit down with your team and clients at the beginning of a project to review the scope in conjunction with the project timeline.

This will mean that you have to explain levels of effort attached to tasks. That's okay too! You'll know all the answers because you have the team and experience to back up timeline and scope decisions. Either way, having this type of conversation early on will keep your clients informed of the level of effort. It will also keep them engaged in your process.

Every project's expectations should be set by a well-written scope of work.

Frequent Checkins

Between deadlines, check in on the upcoming document or delivery and chat with the team about what each will entail. Are your deliverables changing based on previous work? Will that impact the scope and the timeline? Explain the benefits of check-ins and how their constructive, helpful feedback will make the end deliverable stronger. **Remember when it comes to setting expectations, there is nothing wrong with repeating yourself as long as your repetition is meaningful and timed just right!**

Later on in the series, we'll get into how to manage scope, timelines and resourcing in detail.

> **TeamGantt Tip :** Use the team collaboration features in TeamGantt to communicate with your team on tasks and projects.

It's Not About You

Being a part of a project team can be fun and creative, even of the managerial side of the team. You've got to check in on progress and next steps so phone calls or meetings will happen where maybe the whole team isn't present. After all, your team needs time at their desks or in the field to work.

Inevitably, there will be times in any project where left-field ideas arise, new requirements, and questions that will come to you. Proceed with caution, project manager! If a client, partner, or team member is approaching you about any of these things, it's best to make sure the ideas check against your project requirements. The documentation isn't always the bottom line, but it's best to be open about any idea or a conversation. Know when to involve the team to help the conversation and the decision making process. For instance: Is the client asking something that is design or development-specific? If yes, pull in the appropriate people. They can help answer the question, and possibly even do it better than you. That's where things get tricky: don't think of yourself as "just the PM," but recognize that you are just the PM. Not the PM, design director, and consultant. It's more about owning your role and being honest about your expertise.

Don't think of yourself as 'just the PM,' but recognize that you are just the PM.

Don't Be a Know-it-all

A project manager should never answer to project issues completely alone unless they were previously documented or are specific to budget, scope, and a pre-determined guideline. After all, your team should staff the experts who are responsible for answering to questions that fall well within their realm. Your job is to know when to farm questions to them without getting in the way of their work. Ideally, if you don't know the answer and you can't pull someone in the room at that moment, take good notes and follow-up. There's nothing wrong with following-up on a conversation when the time is right. That's when you become "The Good PM" and not "Just the PM."

Later in this series, we'll get further into the mechanics of working well with (and winning over) clients and how to become the project manager everyone wants to work with in this series.

Be Your Team's Biggest Fan

You may not be a peppy cheerleader by nature, but **every project needs a leader who owns and supports the process.** A good project manager will enforce process and keep everyone on the team in-sync. Juggling timelines, deadlines, and deliverables is key, but a project manager who also supports the process, the team, and the client, brings true value to a project. **Be the one who says, "Wow, this is really nice. Good work".** Celebrate the wins and encourage the team to do the same. At the same time, don't be afraid to be the one to say, "Did you think about X?" to look out for the best of the project and your team.

If you're the PM and you're really doing a good job, you will know and understand every aspect of the project, and potentially be able to anticipate questions or concerns the client might have. This type of behavior not only supports your team and your project, but shows everyone involved that you are genuinely engaged, and not just worried about the PM basics.

Every project needs a leader who owns and supports the process.

There is no doubt that project management is one of the most challenging and rewarding career paths one can take. A good project manager can help a business clarify goals, streamline processes, and increase revenue. It's no surprise that PMs are highly sought after in many industries. But no matter where you take your PM skills, you have to hang on to the core skills that will make you "good." At the heart of it, you must be highly organized and process driven, but being an easygoing, adaptable person who genuinely likes a good challenge will make you the best PM. We're looking forward to sharing more lessons learned, best practices, and tips on how to be a good project manager. Stay tuned.

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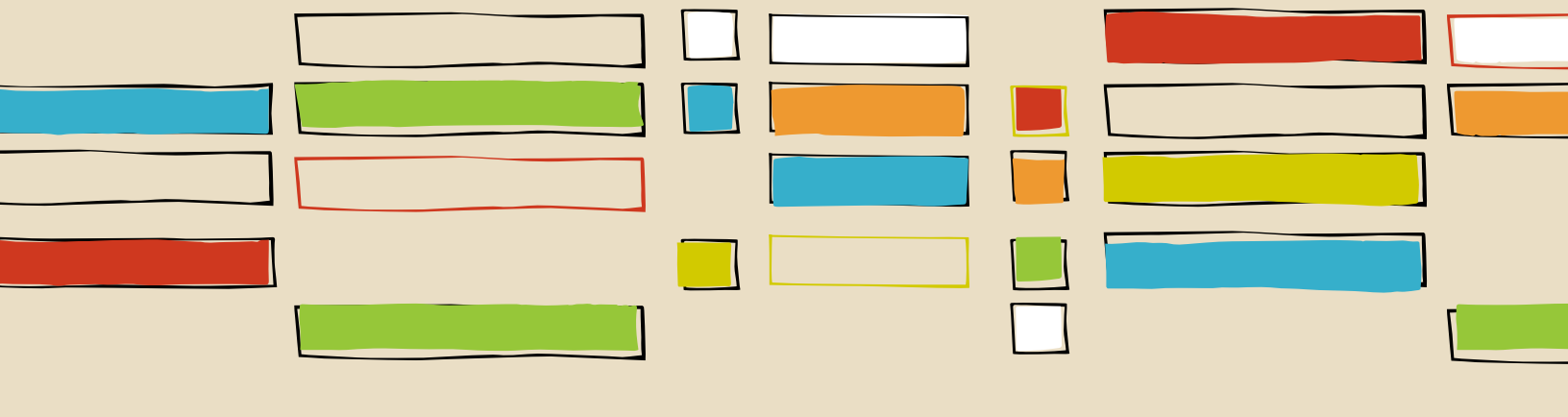
The Dark Art of Project Estimation

No matter the size or budget, estimating a project can be a daunting task. Every project request comes with a mystical, gray area that makes everyone nervous about expectations concerning cost, timelines, and level of effort. Because the gray area changes from project to project, there is no magical potion for creating a solid estimate. In order to create a workable estimate, you need to know your team, deliverables, tasks, and process like the back of your hand. You also have to be comfortable asking questions to figure out the things that you (and maybe even your potential client or customer) do not know.

This chapter touches on best practices for creating project estimates grounded in your understanding of a project reality and being prepared for that alternate universe that eventually ends up in a change request. Get ready to learn a whole new set of dark arts, because you're about to become the best project estimator in the business.

One of the biggest problems PMs face is having a solid understanding of what each team member does on a daily basis.

Understand What It Takes

One of the biggest problems project managers face is having a solid understanding of what each and every team member actually does on a daily basis. A good project manager will know his or her own role very well. He or she can:

- Build a project plan out in a few hours

- Set up and facilitate a communications plan

- Read a spreadsheet, understand it, and translate it for anyone who asks what it's about

- Build a status report based on metrics provided by his or her favorite PM tools

All of this is great, but only if you're the PM who sits behind a desk and doesn't actually engage in the work. Here's the thing: you MUST engage in the work to be a good project manager. You can't be a desk jockey. You have to dig into the work along with your team and take the time to understand all of the things that will cause your project to go over budget. We're talking about: the people, the budget, and the scope.

Learn What You Can

I work in the web industry and I'd never sell myself as a web designer or a developer. That being said, I've learned enough about design and code over the course of my career to make me horribly dangerous. I would never step into a project and say, "I'm the best resource to design or code this," but I know enough about how things are done to ask the right questions and make the proper assumptions about how they should or could be done. This helps immensely when estimating project work.

I learned a lot of web skills early in my career and have had to stay on top of industry trends and major changes ever since. In addition to that, I had to learn a whole new set of people, processes, and clients every time I started a new job with a new company.

A career in project management means you have to always stay on top of trends, changes, and deliverables in your industry. It isn't easy, but it's worth it because it will directly affect your success as a PM.

So how do you stay on top of things? Aside from reading relevant trade publications, websites, and blogs and attending training and networking events, you should leverage the people who sit on your team.

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Understand The Roles On Your Team

Who the heck are these people and what are they doing all day? Sure, it's easy to read Jim's job description and find out what he "does for a living," but that doesn't tell you much about the mechanics of what he does on a task level. That's what you really need to know. So, how are you supposed to understand Jim's role on the team and how his work will impact an estimate?

You just have to talk to Jim.

As a project manager, one of the best things you can do is be genuine and be honest about what you don't know. If you really want to know how or why someone does their job, just ask them! It might sound silly, but most project managers feel like they're supposed to just know everything. You don't, and that is okay. Remember: it's better to admit what you don't know and ask questions. Doing so gives you an opportunity to connect with your team on an individual level, and it will help you to understand the inner workings of your projects. After all, figuring out the steps one person takes to create a deliverable will work wonders in helping you calculate a true estimate.

Understand Process And What Works

Once you've got a good grasp on who does what and how, you need to figure out how all of your project's moving parts fit together—or could fit together.

You may work for a company that abides by a singular process like Agile, Waterfall, etc. In that case, you should study that process, know all of your dependencies, and run with your estimates. If you work in a place that's more liberal with process and likes to experiment, make it your mission to understand how things are done and what might happen if you shift things around. For instance, if you work for a construction company, will there be a huge impact if you plan for your baseboards to be painted before the carpet is installed? Sure, you can do it, but will it affect the quality of the work or the time needed to get the work done? (I've done my share of home improvement projects and can comfortably say the answer is "yes." When the carpet installers scratch up those newly painted baseboards, your client will not be happy to learn they will need to be repainted.)

Do everything you can to understand your process, but don't just read a book or a manual.

Do everything you can to understand your process, but don't just read a book or a manual. Use the rigid methodology taught in a book or a manual to start conversations about how your team employs a method. Talk to your team, ask questions about what you don't know, and feel free to question how, why, and when things are done. The more you know, the better you can strategize with your team or your clients to find alternate ways to make projects work and save on effort.

Also related, always be sure to include your team in any discussions related to estimating projects and process. When estimating projects, talk about the process you might envision taking on with the impending project. This will certainly impact how you think about effort and scope. You'd never want to sign on for a project that the team is not invested in.

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Study History

Without a doubt, historical data can help you with new projects; when history is documented, you can analyze the information to help you create better estimates. A great place to start is asking your team to track their time on tasks, which will give you a better sense for a project's overall level of effort. It's not about cracking the whip or playing big brother and hanging over someone's shoulder—it's being honest about the effort and being profitable at the same time.

It goes without saying that every project is a unique snowflake! Project managers encounter tremendous variety in clients, communications, team members, technology, and so on, but seeing how long your team spent on a certain task or deliverable will give you a sense for estimating a similar task on a new project.

As project managers, we tend to underestimate, thinking we're doing our clients and our team a favor. But we're not! We're doing everyone a disservice and stressing out over not hitting estimated budgets and timelines. Listen up! Drop the stress. Check your tracked time and use it to create a realistic estimate. If nothing else, reviewing the history to make sure you're not habitually underestimating is a great practice.
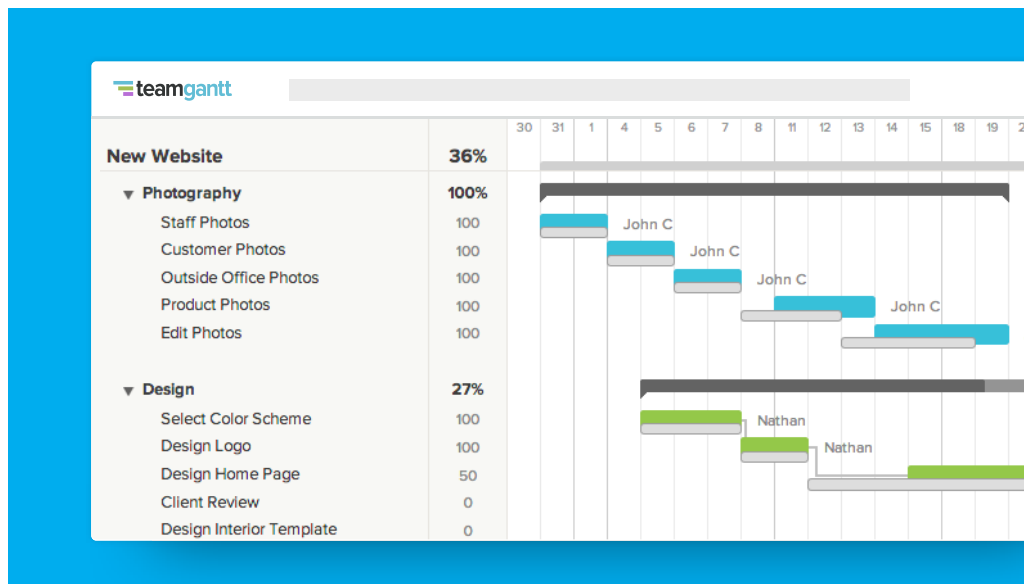
TeamGantt Tip : Check out the project baseline feature in TeamGantt after you've completed a project, check your actuals. Within the feature, you can mark your originally planned schedule and then compare it against your actual work as the project progresses. Note where there might have been issues and how those issues might have impacted your level of effort. This will help you to determine if you might have estimated the project differently, if you had it to do over again.

Ask More Questions

Whether you're estimating a project based on a Request For Proposal (RFP), a discussion, or a brief written message, you need to know every possible detail of the project before you can provide a realistic estimate. This often means that you have to ask more questions. Don't be bashful! Many clients don't realize that you need a tremendous amount of information in order to prepare a true and fair estimate. They also might not realize that they already have the answers to your questions.

One of the biggest culprits behind mis-estimated projects is the lack of pertinent information and background provided on would-be projects. Get your clients to clear up that gray area and help you break the project down into pieces. That way, you'll be able to create an estimate based on what they need, not what you think they need.

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What Do You Need To Know?

It's often easy to take a project request at face value. The problem with doing that is the fact that there are likely a lot of details to uncover. So put your thinking hat on and scrutinize the request. Here are some things to think about on any project request:

- What is the goal of the project?
- How will you and your client determine if the project is successful?
- What returns will you and your clients see as a result of the project?
- Who will participate from the client side?
- What range of services does the project require?
- What is your client's budget for the project?
- Is there technology involved? If yes, what is the technology?
- Does your client employ anyone with expertise on the topic?
- What is the timeline for the project, and will your client require your services after your work is complete?

This list could go on and on depending on the level of information you're provided. Be persistent and get the answers you need. And, if your client is not inclined to answer every question, take it as a sign. If it's too much to answer a set of questions to help you form a good estimate now, will it be too much for them to be a good partner when the project is underway? Use your judgement in this respect. Not every estimate becomes a real project, so not every request needs to become a real estimate.

Apply A Work Breakdown Structure

We're pulling out some basic, old school PM knowledge here. Do you know what a Work Breakdown Structure (WBS) is?

A fixture in classic project management methodology and systems engineering, the work breakdown structure is a deliverable-oriented decomposition of a project into smaller components. A work breakdown structure is composed of a hierarchy of specific elements; an element may be a product, data, service, or any combination thereof. A WBS also provides the necessary framework for detailed cost estimating; it provides guidance for schedule development and control.

Creating a work breakdown structure for any plan helps you get granular about project tasks.

Creating a work breakdown structure for any plan or set of tasks helps you get granular about the work that needs to be done on any given project. Below is a very basic WBS for a very common deliverable—moving! Check out the tasks and every aspect related to the event that the author has taken into consideration. Is anything missing?
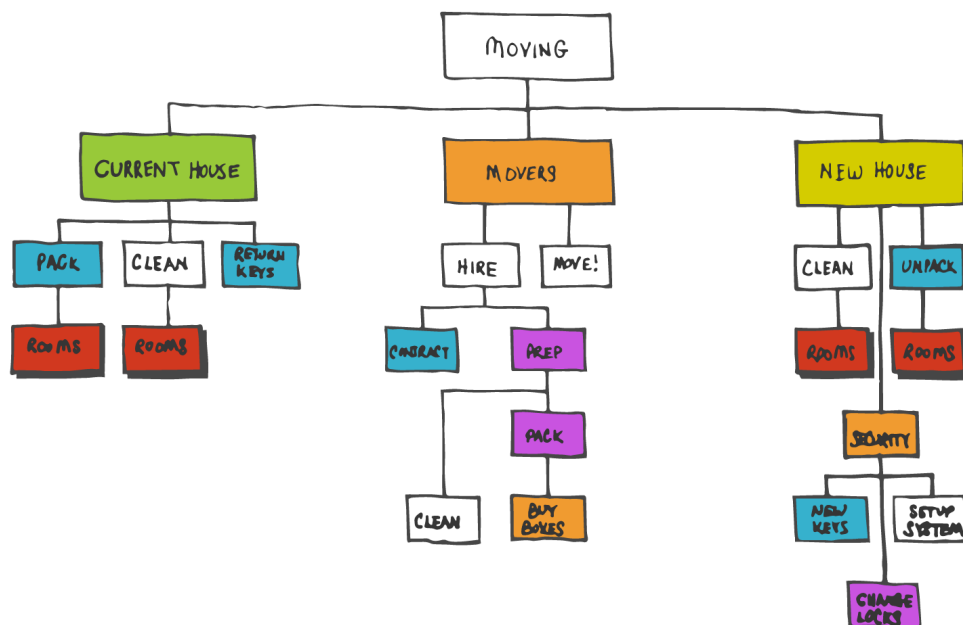
If you estimate your projects based on units—whether it be weeks, days, or hours—using a WBS will help you understand very quickly if your estimate will exceed the intended budget. Let's take this example further and assign estimated hours to each step, but just remember, it could change when you dig into the actual work. (These time estimates should be based on a combination of experience and hypotheses.)

Current House

Pack: 8.5 days total
* Sum of tasks includes, wrapping objects, packing in boxes, prepping for movers. Rooms and estimated timing is as follows:

- Kitchen: 1 day
- Bathroom: half day
- Bedroom 1: half day
- Bedroom 2: half day

- Living Room: 1 day
- Dining Room: 1 day
- Basement: 2 days
- Garage: 2 days

This type of exercise can be extremely helpful during the sales process when a client tells you they have X dollars to spend. Based on your estimates, you can easily map a set of tasks or deliverables to something that works for both the dollar amount and the client's goals. And, if a potential client comes back and says, "Well that seems a little more than we want to spend," you can lean on your work breakdown structure to negotiate the cost down based on what's included in your scope. For instance, if I had to cut down on cost/time on moving based on my hours efforts, I could likely remove the "cleaning" step from my "moving" WBS (though I'm sure someone might be unhappy about that). Use the WBS to your advantage this way and you'll not only create a project estimate that maps to a specific budget, you'll work out a solid set of project requirements.

Using these techniques as a foundation to create your estimate will help you with the next step: turning it into a project plan.We'll discuss project planning more in the next chapter.

Estimating Projects With Teamgantt
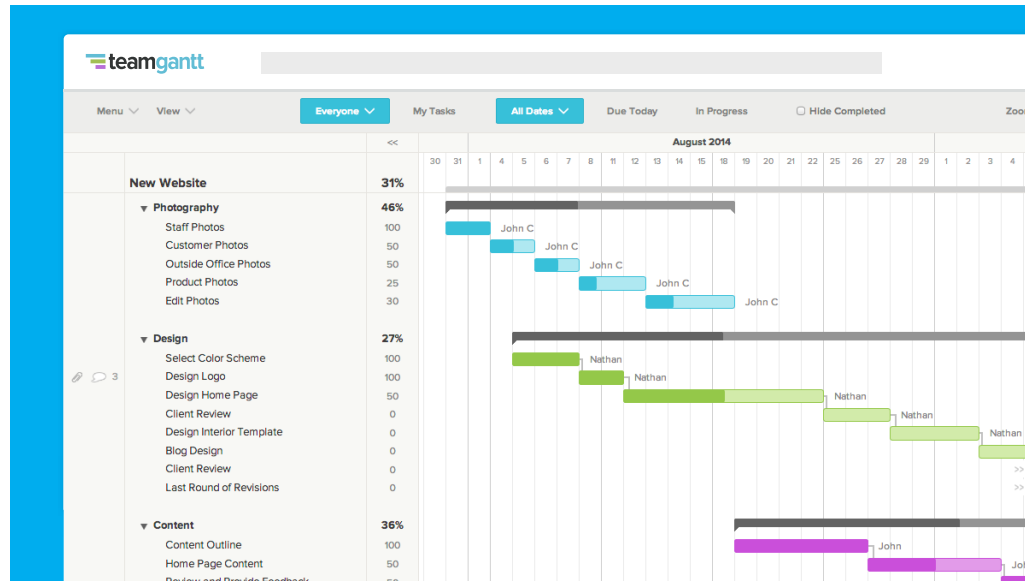
Another easy way to estimate a project is to use one of your favorite planning tools. TeamGantt makes it easy to set up a potential project. In fact, it gives you a more formalized way to list out your work breakdown structure and assign tasks and timelines to your team. You can create those timelines based on effort and assign resources (or people) to tasks. From there, you can schedule people against other project work. Learn more about Team Gantt.

Get To It

You'll find that there is no right or wrong way to create an estimate. Your own dark art of estimating projects will include a mixture of project knowledge, historical review, client inquisition, and a ton of gut instinct.

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Writing And Selling A Masterful Project Plan

Every project tells a story about its goals, team, timing, and deliverables. Some of those stories are short and to the point while others are epic novels rife with twists and turns. No matter the length or level of drama, every story is based on a story arc or an outline--or as we call it in the project management world, a project plan.

Every project tells a story about its goals, team, timing, and deliverables.

As the author, a proud project manager may look upon his or her masterfully crafted plan as a work of art that transcends the ages—an elegant response to a complex challenge. A good project plan is worth being proud of because it represents the confluence of so many factors: project scope, professional experience, research, process knowledge, and a ton of input from clients and team members. That may sound like a lot for what seems to be a simple document, but as the author, just focus on writing one "sentence" at a time and it will all come together. If you want to make a plan that reads like a dream as opposed to the latest thriller, you can take steps to make sure it is well thought-out and thoroughly sold to your team and clients.

At its core, a project plan defines your approach and the process your team will use to manage the project to scope.

What's In A Plan?

Project planning is at the core of what all project managers do, no matter the industry, type of project, or their level of expertise. At its core, a project plan defines your approach and the process your team will use to manage the project according to scope. Every project needs a plan; not only does it go a long way toward keeping teams honest in terms of scope and deadlines, a plan communicates vital information to all project stakeholders. If you approach it as something more than a dry document and communicate that aspect of it differently to everyone involved, it can and will be seen as integral to your project's success. The fact is, a plan is more than dates. It's the story of your project and you don't want it to be a tall tale! Like any well written story, there are components that make it good. In fact, any solid plan should answer these questions:

- What are the major deliverables?
- How will we get to those deliverables and the deadline?
- Who is on the project team and what role will they play in those deliverables?
- When will the team meet milestones, and when will other members of the team play a role in contributing to or providing feedback on those deliverables?

If your plan answers those questions and educates your team and clients on the project logistics, you're creating a viable, strategic game plan for your project. Feel like you've written a work of fiction? Use those questions as a gut check after you've created your plan, and keep reading. There are a few steps you can take to ensure that your project plan goes down in history for being well-written and on target.

Before You Jump Into Teamgantt...

As soon as you've agreed on a project scope, someone will inevitably ask you for a project plan. Take heed, friends! While a plan is fairly easy to construct, remind everyone involved that the journey of creating a plan does not consist of you, the project manager, sitting down and writing up your approach and dumping it into your project planning tool of choice. In fact, that's the opposite of how you should handle it.

A solid plan is created after you've done your research about the team, your clients, and your project and have determined all of the factors that will make that plan change. That's right—you should build a plan with inevitable changes or delays in mind. Make sure that you've done your due diligence by asking about the factors that could delay your project, but go beyond that; good project managers plan for the unplanned. They do this by devising an optimal route through the project, with contingencies and backups in place and ready to go. If you have a solid construct for why you built a plan a certain way, you'll be able to roll with the changes and quickly communicate time delays and impacts.

A solid project plan is created after you've done your research.

Start With Research

Before you start a plan, you have to stop yourself and make sure you know all of the facts. Take a deep breath, then dive into the documents and communications relevant to the project. Print the scope of work and all details that come along with it (maybe an RFP or notes from sales calls or meetings with your client team) and read them end to end. Be thorough. Understand the details and ask thoughtful questions before you commit to anything. A good project manager is well-informed and methodical in the way he or she guides a project. At a minimum, you'll be responsible for possessing a thorough understanding of:

- The goals of the project

- Your client's needs and expectations

- The makeup of your client team and their decision making process (i.e. How they'll review and approve your team's work), which might answer:

  - Who is the Project Sponsor and how available is he or she?

  - Who is the PM and will he or she plan on being in constant contact with you (they need to be)

  - Who are the additional stakeholders your team should be aware of?

Set time aside with your client to ask some tough questions about process, organizational politics, and risks.

In addition to all of your questions about your client team and their expectations, set some time aside with your main client contact and ask them some tough questions about process, organizational politics, and general risks. Doing so will not only convey that your team has the experience to handle any type of difficult personalities or situation, it shows that you care about the project and want it to run smoothly.

Questions that may impact a project plan:

- Has your team discussed how you will gather feedback?

- Who is the final sign off? Or, who owns the project?

- Is there a stakeholder we need to consider who is not on your list? (A president, dean, the boss's wife?)

- What is the project deadline? What are the factors or events that are calling for that date? (a meeting, an ad campaign, an event?)

- Are there any dates when you will be closed or not available?

- Will there be any meetings or points in the project where you'll want us to present on the current project status to a larger group (i.e a board meeting)?

- Has your team been through a project like this in the past?

- How did it go?

- Is there anything that would prevent the project from being successful?

- Is there a preferred mode of communication?

- Are there any points in the process that some stakeholders might not understand that we can explain?

Write Your Manuscript

After getting the answers you need, take some time to think about the responses in in light of the project goals and how your team might approach a similar project. If you're at a loss for where to start, take a look at the questions at the beginning of this chapter to outline the Who, What, When, and How of the project. Think about the tasks that are outlined in the scope of work and try to come up with a project approach by sketching something very high-level on paper. Yes, paper. All you need is a calendar to check dates.

> **Side Note:** There will always be multiple ways to execute the work you're planning, and it's easy to focus on what the end product will do and what it will look like. Do yourself a favor and don't go there. Think about the mechanics of how it will happen, not what it will look like when it's complete. Getting tied up in the execution will only confuse you and likely make you feel unimpressed by the final product because it's not what you envisioned. Remind yourself: You're there to plan and guide the project, not create it.

A first sketch can be very rough and might look something like a Work Breakdown Structure, as noted in Chapter Two. Make sure your sketch includes

- Deliverables and the tasks taken to create them

- Your client's approval process

- Timeframes associated with tasks/deliverables

- Ideas on resources needed for tasks/deliverables

- A list of the assumptions you're making in the plan

- A list of absolutes as they relate to the project budget and/or deadlines

Doing this will help you to organize your thoughts, formulate what might work for the project, and then transform everything into a discussion. It may seem like a lot, but it all leads to building a solid, sustainable plan.

Talk To Your Team

If you've read Chapters One and Two, you know that project managers need to be in constant communication with their teams. Starting a project must begin with clear communication of the project goals and the effort required to meet them. This comes with understanding the fact that a project manager can't always plan the project on his or her own. Sure, you can—but if you're interested in team buy-in, you won't. The reason you won't is because you don't want to put yourself or your team in an awkward position by not coming to a consensus on the approach before presenting it to your client. Doing that would be like stabbing every single one of your co-workers in the back. Not so good for the old reputation.

Starting a project must begin with clear communication of the project goals and the effort required to meet them.

It's also great to utilize the super-smart folks surrounding you to get their input on how the team can complete the tasks at hand without killing the budget and the team's morale. As a project manager, you can decide on Waterfall or Agile approaches, but when it comes down to it you need to know that the team can realistically execute the plan.

You can also use your project plan review time to question your own thinking and push the team to take a new approach to the work. For instance, if you're working on a website design, can designers start creating visual concepts while the wireframes are being developed?

 Will it make sense for this project and for the team? Can you have two resources working on the same task at once?

Running ideas by the team and having an open dialogue about the approach can not only help in planning the project, it's also a big help in getting everyone to think about the project in the same terms. This type of buy-in and communication builds trust on a team and gets people excited about working together to solve a goal. It can work wonders for the greater good of your team and your project.
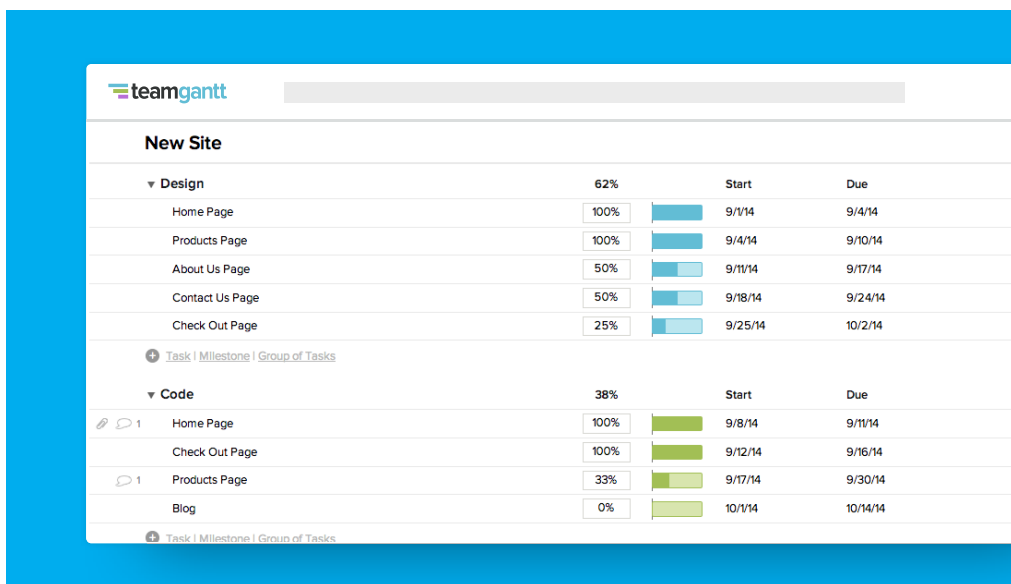
Write It!

When you've got all the info you need and you've spoken to all parties, you should feel more than comfortable enough to put together a rock solid project plan using whatever tool works for you (Ahem, TeamGantt works nicely for a lot of happy customers). Any good tool will help you to formalize your thoughts and lay them out in a consistent, readable way.

Make It Readable

There is no doubt that reading a project plan can be…boring. So, in order to stop your dear readers from skimming your work of art, use some formatting skills to make tasks, durations, milestones and dates are crystal clear. No matter what tool you're using, you should be able to do these things:

- Include all pertinent project info:

- Client Name, Project Name

- Version Number, Delivery Date

- Break out milestones and deliverables in sections by creating headers and indenting subsequent tasks (reading one long list of tasks is really monotonous and can be mind numbing even to the best of us)

- Call out which team is responsible for each task (example: "CLIENT: Provide feedback")

- Add resources responsible to each task so there is no confusion about who is responsible for what.

- Be sure to show durations of tasks clearly. Each task should have a start and an end date.

- Add notes to tasks that might seem confusing, or need explanation. It never hurts to add detail!

- Call out project dependencies. These are important when you're planning for the risk of delays.

- Include your company's logo and your client's logo if you're feeling fancy.

- Use your company's branded fonts if you're feeling really fancy.

			Start	Due
New Site				
▼ Design	62%		Start	Due
Home Page	100%		9/1/14	9/4/14
Products Page	100%		9/4/14	9/10/14
About Us Page	50%		9/11/14	9/17/14
Contact Us Page	50%		9/18/14	9/24/14
Check Out Page	25%		9/25/14	10/2/14
Task | Milestone | Group of Tasks				
▼ Code	38%		Start	Due
Home Page	100%		9/8/14	9/11/14
Check Out Page	100%		9/12/14	9/16/14
Products Page	33%		9/17/14	9/30/14
Blog	0%		10/1/14	10/14/14
Task | Milestone | Group of Tasks				

In addition to all of this, you should be as flexible as possible when it comes to how your plan is presented. There is no absolute when it comes to how you represent your plan as long as you and your team understand what goes into one Remember, people absorb information differently; while some people prefer a list view, others might prefer to see a calendar, or even a gantt chart. You can make all of those variations work if you've taken the steps to create a solid plan.

You should be as flexible as possible when it comes to how your plan is presented.

Planning With Teamgantt

TeamGantt gives you the ability to quickly and easily plan your project using most of the tips listed above, and makes it even easier to adjust using a simple drag and drop feature. Creating a gantt chart based on the steps you've outlined for your team is easy and kind of fun. Plus, once you have created your project, you can have peace of mind knowing that you thought ahead and have a plan to guide you along as you go. Learn more about TeamGantt.

Planning With Teamgantt

You're almost finished! You've done your research, sketched your approach, discussed it with your team, and built your formal project plan. Do yourself one quick favor and ask someone on your team to review it before you hand it over to your clients. There's nothing more embarrassing than being a project manager and delivering a plan with an error—like an incorrect date. It'll take someone 10 minutes and you'll have peace of mind.

Make Sure They Read It

After you've put all of that work into creating this important document, you want to make sure that it has actually been reviewed. When you're delivering your plan, make sure you provide a summary of it in prose format. A brief message that covers the overall methodology, resources, assumptions, deadlines, and related review times will help you to convey what the project plan means to the project and to everyone involved.

Don't be bashful about it: explain the thought that has gone into the process of building the plan, and open it up for discussion. It can be good to set up a call to review the plan line by line with a client. This ensures that your client will understand the process, and what each step in the plan means. Sure, you might have to explain it a few more times, but at least you're making the effort to help establish good project planning standards across the board and educate your clients on how your team works. And again, it shows that you care.

Get Planning

Sometimes projects are smooth and alarmingly easy to manage, and sometimes they are a complete nightmare that wakes you up at 3 a.m. every other night (it happens). Regardless, plans will change. With a good team and a clear scope of work, you're on your way to making a solid plan that is manageable and well-thought out. In the end, having a solid plan is your best defense against project chaos.

If you're an easygoing project manager who can adapt your approach and your plan to go with the flow while calling out the appropriate risks, you'll find yourself happy. Otherwise, the daily changes will cloud your vision and you'll focus on things that won't help your team, your client, or the project. And remember: project managers can have fun too! So pick up your project scope, dig into your own research, and start writing your next masterpiece.

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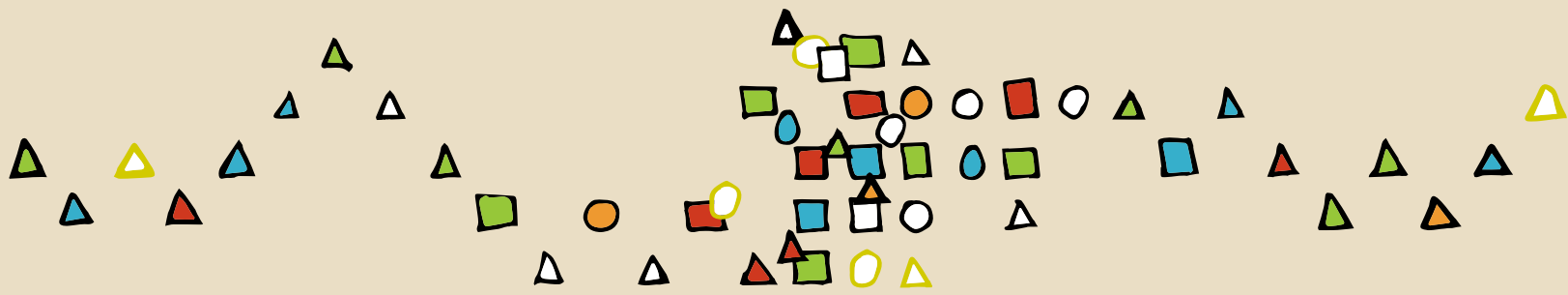
Taming The Scope Creep

I t happens all the time: a client's business changes or a new stakeholder gets pulled into a project, and you're forced to have discussions about things that were 90% complete, or possibly already approved. This type of thing can kill morale, draw out timing, and completely drain a project budget. The first reaction of the PM is to build a wall to ward off impending scope creep. But that's impossible, because scope creep isn't a person or an animal you can tame—it's an idea that can spin your project out of control.

So how do you tame scope creep on your projects? It's your job as the project manager to act as both the project gatekeeper and the cheerleader, to monitor, manage, and report on its progress, and to nobly guard your estimate, scope, and timeline with courage and diplomacy.

Any change, additional request, or new requirement can bring a bit of project stress for any PM.

You've Already Got This!

Any change, additional request, or new requirement can bring a bit of project stress for any PM.

But when you're caught up in that moment, it's always good to remember that you've got a lot to fall back on, provided you've done your due diligence and have truly read and understood your scope, built a plan based on that scope, and have completely vetted it with your team and your clients.

> **Tip :** Keep a file shortcut or a local folder of documents on your desktop so that you can refer to them quickly. This should include copies of your most recent plans, scope of work, and estimates. Having them handy will save you time as opposed to wading through folders.

The initial steps of a well constructed PM process will truly carve a path to success for you—and your project. Don't ever be shy to stop a conversation and say, "Let me refer back to the estimate/scope/plan and get back to you." You should never expect to (or be expected to) have every detail committed to memory—especially if you're responsible for more than one project. So take your time, don't jump to provide an immediate answer, and always remember that a solid response is going to have the best impact.

Don't be shy to stop a conversation and say, "Let me refer back to the estimate/scope/plan and get back to you."

Stick To The Plan, Man

Remember all of that work you put into your plan? Don't let it all go down the drain by succumbing to every new issue and request. That first version of your plan is your baseline and it outlines every step you need to take to get from the beginning to the end of your project. You don't just make these things up! If you're doing it right, you're basing it on your estimate and scope. Sure, plans can change, but referring to that first plan as your baseline will often help you in arguing the case for more time or more budget when new scope starts to creep in. Stick to the plan and use it as your project's roadmap.

Versioning And Reporting

Not every project change will result in a scope change. Sometimes unexpected things happen: someone gets sick, a stakeholder has gone missing and can't provide feedback, a baby is born! You get the idea. If plans change (and they likely will) be sure to keep track of those changes. Don't ever try to slip in a timeline update without notifying everyone involved. Always communicate it in several ways. Here are some helpful strategies for communicating changes:

1. **Provide an updated project plan.** Update all impacted tasks and keep notes on extensions in your newest version. For instance, if a client milestone is missed and a deadline is extended, make a note in the planned task. Most planning software includes a handy "notes" field, so it's easy to note, "Baseline date was <month/day/year>, Actual was adjusted to in of this plan on <month/day/year> due to <silly reason>." After you've updated everything and double-checked your dates, make a new version and save the old one in a safe spot.

TeamGantt tip : Drag and drop to update your plan and get an answer on new timing within minutes. You should also baseline your plan to keep track of the many versions you might encounter. To create a new baseline set: Open the project (or projects), click Menu > Baselines > Create New Baseline Set.
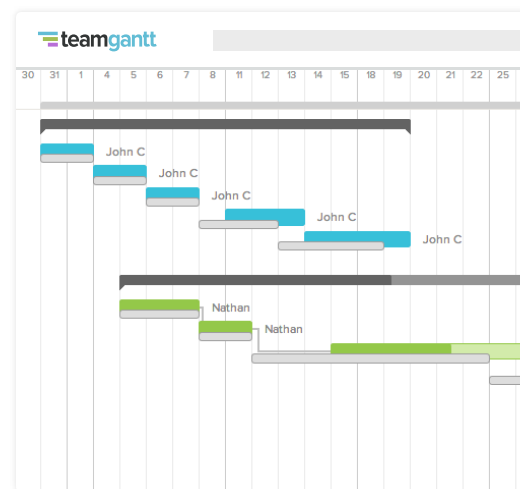
Dependencies in a gantt chart can be really helpful when you have a project requiring tasks to be done in a certain order, so be sure to check those out in TeamGantt as well. This way when you reschedule a task, other tasks that are dependent on it, will automatically be rescheduled as well. Sign up for a 30 day free trial and try it out.
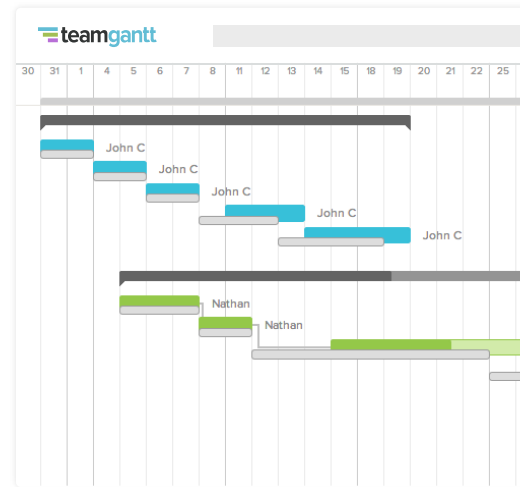
2. **Provide an update in a project status report.** You should always be reporting on current timeline status in your regular status reports, so it's a perfect spot to report on the updates you've made to your plan. You might choose to replicate the note made in your plan or even attach the plan for review and discussion.

Don't be shy to stop a conversation and say, "Let me refer back to the estimate/scope/plan and get back to you."

3. **Discuss changes and impacts.** A date is a date. If someone misses a deadline, your next delivery date might be impacted, as well as the final deadline. Missing deadlines will most often cause an impact, whether it be on your resourcing plan, the next delivery, or the final deadline. Don't fear the conversation about timeline issues and impacts, especially if you've made the time to discuss and review your baselined plan. Talking things out while a change is happening will help everyone to understand what is affected.

4. **Note or add the change in your project requirements document.** This document is created for your team to review/revise, and check against throughout the project. Don't forget to refer back to it and keep it up to date, since there are times when the document can become buried in the project.

Be open about your change control process.

5. **Be open about your change control process.** This is equal parts setting expectations and creating process. If you're in a larger organization, you might be required to complete a series of approvals (read: documentation) to ensure that everyone on your teams agrees to a change in plans or timeline. On smaller projects with smaller teams, it's often easy to merely take everyone's word for it and keep moving on with the changes. In that instance, it's not a horrible idea to create a "paper trail" associated with a particular conversation or change. Here are a couple easy ways to do that:

*   Write a change request. Use your judgment here, but it's never a bad thing to write a change request for a non-scope related change. It can be a good way to cover your bases and ensure that no one will go back on what had been verbally agreed to via email. Any good change request will include:

    *   Description of the change

    *   Approach to change

    *   Schedule/timeline impact

    *   Risk

    *   Cost (if applicable)

    *   Signatures (ALWAYS require these)

What If There Is An Associated Cost?

People hate talking about money. It's your job to talk about things that people hate. That's just how it is for project managers. So, the best way to approach topics like budget overages and scope creep is to handle them head on and document, document, document! But it often doesn't just start with a document! It starts with the work and the conversation surrounding that work.

People hate talking about money. It's your job to talk about things that people hate.

A change in scope should never be a surprise to you or your clients. They wouldn't call it "scope creep" if it didn't slowly slither up on you. Sure, some requests are obviously out of the boundaries of your scope and you can address them immediately. But there's often that one feature or requirement that starts as a manageable piece of scope and slowly evolves into something else. This, my friends, is scope creep. And it's your job to keep an eye on these things and make sure that they are not killing your budget.

Creep The Creep

When you do realize that they're going to kill your budget, use your documentation and status reports to call out the issue. The first step would be to reassess the budget and note where the work is trending. Take a look at the project hours and estimated effort, then check in with your team to see if they would estimate an overage. If they confirm, you need to make your clients aware right away. If they think it's fine and you're just being an alarmist, you might want to let your clients know about the potential risk anyway. It never hurts to show that you're thinking ahead and being budget conscious. The best way to do this is to make it formal. Create a "Risk/Issues" section in your status report so you can write out potential issues and then discuss them with your clients.

Discussing the issue might feel uncomfortable, but it doesn't have to be. Calling things out early will give you the time to think through a mitigation plan and discuss it with your clients. Plus, by not waiting until the very last minute to call out the issue, you're positioning it in a way that will help everyone involved to devise a reasonable approach to the change; you always have your scope and baselined timeline to back you up. A well researched and planned discussion surrounding the risk of scope creep will help put you, your client, and the potential issue at ease. Anything can be sorted out with planning and discussion.

What If The Client Says "No"?

Sometimes you'll get to a point where the team can't continue work without a budgetary change request, but the clients don't want to agree to it. Talk about uncomfortable! It's never easy to proceed under these conditions, but as the PM, you have to come up with options. Here are a few scenarios to think through:

- Can you trade scope? Meaning, if your team does let scope creep commit a hostile takeover, can you cut something else from the project to make up for lost time and/or budget?

- How will the change impact the quality of the product? If it's going to make it worse, how does that impact your bottom line?

- Is your company willing to "eat" some of the cost in order to develop a better product and keep the clients happy? If yes, what is that cost?

No matter what the answer is, you'll need the buy-in of your team and management to make the change that is best for your project, your clients, and your company. It's never an easy decision to make.

What About Quality?

At the end of the day, everyone wants to deliver a quality product that is successful and evokes a sense of pride.

So, while it's important to complete and deliver on time and under budget, you should never lose sight of delivering a quality product; the expectations of what you're to deliver should never be overshadowed by the scope or timeline.You'll always use your timeline and budget as the guiding light, but it's important to set forth what will make the project a success in the eyes of your clients and your team. Just a few questions, asked at the beginning of a project can help establish:

- What are the goals of the project?

- What will make the project a success?

- What can we do to insure success?

- How will you measure success after completion of the project?

Asking these questions will help your team set some targets within the context of your project budget and timeline. Having goals helps you set the stage for how you can meet them within the constraints of the project. Goals can also help you gauge the validity of new requests as they come in. If you're experiencing scope creep and the work doesn't actually meet a goal, it's much easier to cut it out.

The best PMs take the time to diagnose scope creep, study it, and develop an approach to accept or deny it.

Watching Scope Is Easy!

A good project manager can sense scope creep the minute it's hinted at. A better project manager takes the time to diagnose the scope creep, study it, and develop an approach to accept or deny it. The best project managers take the time to get through all of those steps and approach the situation with a level head. Any project problem — scope related or not — can be resolved with a conversation that references previous work you've done on your project. In fact, all of the time you put into creating an estimate, scope, and timeline will make approaching any problem easier.

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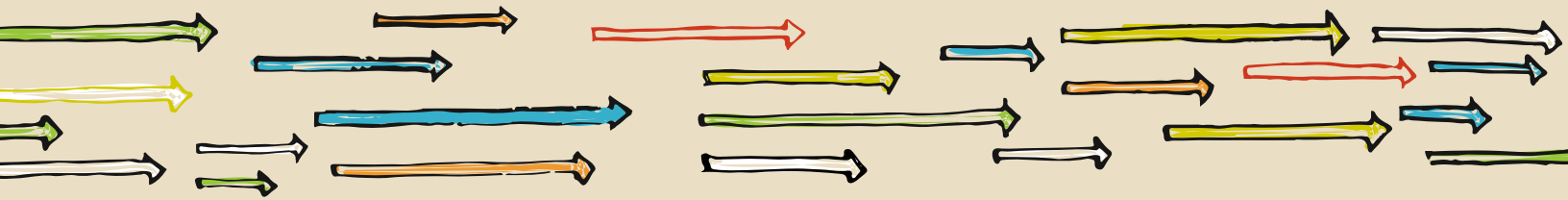
Chapter 5

If They Expect A Unicorn, It's Your Fault

What are you expecting from this chapter? Let me guess—it's not a sparkly unicorn. I wish I could say you were wrong. But let me tell you what to expect: Some tips and tools to help you to better set and manage expectations on projects with your team and your clients.

See what I did there?

I set expectations with one line. it's all about delivery and the way you communicate details. Of course, it's not always that easy on projects, but it's an art you can hone and master. You are the general directing action on the front lines, and every word of your strategy is critical. So, read on for tips you can use from beginning to end on many types of projects. If you actually wanted the sparkly unicorn, you should skip this chapter.

The best way to set expectations is early and often.

Take It From The Top

The best way to set expectations is early and often. As a project manager who sits between an internal team and a client, you have to be very detailed and persistent when it comes to communications and relaying vital parameters to the collective team for what to expect at every turn of a project.. If you're not laser focused on the details, things like project requirements and tight timelines will become painful issues for everyone to deal with. If a detail is missed or miscommunicated, goals can be derailed, time can be vaporized, budgets compromised, and frustration catalyzed. And the PM will always—always—be blamed for it.

So how do you stay on top of it? From day one on a project, be very clear about what should be expected of you as the PM, your team, your process, and your clients. Every person and aspect is integral to the success of the project, and it's better to lay it all out; loopholes all too often set the stage for scope creep to manifest.

Pre-kickoff Meetings

At the beginning of a project, set up two separate meetings—one with your team and one with your clients—to discuss all of the detailed documents and processes that will make or break your project. Thing like scope, timeline, requirements, and even reviews of conversations that were conducted during the sales process can be very valuable to anyone who is invested in a new project. Review the formal documents using a low-pressure discussion to make those things feel more accessible and understandable. This will help to ensure that everyone on the team is aware of all of the critical pieces of information relating to project formalities.

If you're not laser focused on the details, things like project requirements and tight timelines will become painful issues for everyone to deal with.

Sample Client Pre-kickoff Meeting Agenda:

1. **Introductions:** Let the clients know who is on the team and what they will be responsible for. If possible, include them in the meeting.

2. **Review Scope:** Review the document at a high level. As it turns out, your client may not have read the final version of the document. Make sure they understand what is included... and excluded in your scope of work.

3. **Discuss the Timeline:** Be clear about the final delivery date. Discuss reviews and approvals. Make it very clear what potential dependencies will be, and discuss how you would handle potential project delays.

4. **Discuss Project Requirements:** Have they been documented yet? If they have, review them and make sure that you completely understand what is expected of the project based on what they indicate. If they aren't documented, start the conversation and talk about how you will come to agreement on what's needed.

5. **Discuss Project Communications:** This is critical. Be sure that everyone is aware of the communication tools you'll use, and how you best communicate. Get your team into a groove with the method and check-in routines that everyone finds easy and useful. Some people like the immediacy of phone calls, desk visits, and instant messaging, while others prefer email and notes left in online project hubs. Find that balance between real-time communications, daily or weekly reports, and everything in between. This also carries over to how you communicate with the client, since invariably what works with one may not be a good idea for another. Adjust accordingly, but determine the avenues and frequency of communications upfront and make sure everyone agrees to them.

6. **Next Steps:** It's always helpful to recap expectations and assignments; help keep your team and clients on target by reminding them of what's next up on their plate. Take a few minutes to call out action items and next deliverables before ending any meeting.

Assign Project Roles

Large projects can be complex: tasks often overlap, are dependent on other tasks, or are so voluminous in scope that more than one team member ends up working on it. If you don't set expectations on who does what, when, staffing can get confusing all too quickly. Be sure to assign specific project roles and the explicit responsibility for each task, as well as making sure that communication is flowing according to agreed-upon standards. A helpful tool in helping to determine team responsibility is a RACI matrix, which describes the way various roles participate in completing tasks or deliverables for a project or business process. It is especially useful in clarifying roles and responsibilities in cross-functional/departmental projects and processes.

It's also important to make sure the entire team takes responsibility for documenting meetings. Often, a PM will be responsible for this, but there are tons of meetings and conversations that a busy PM will miss out on. So, don't always rely on one person for notes; make note-taking and circulation a shared responsibility. For instance, if you're in a hallway and something interesting or impactful comes up organically in discussion, don't forget to document it. Taking three to five minutes to share potentially critical info with your team could save you from time and budget worries.

Taking 3-5 minutes to share potentially critical info with your team could save you from time and budget worries.

Using a web based tool to hold all of that information will facilitate good communication and knowledge sharing. Half the battle in the war against poor communications lies in knowing when and where communication should happen and how it will be documented.

Talk About Process And How You Will Work

Every project is unique in some way. Sure, there may be shared approaches and deliverables across projects, but discussing how you'll use them on each project is critical for each project's success. Follow the tips outlined in Chapter 3 and you'll be establishing expectations for process, deliverable reviews, stakeholders, and your timeline--all in one fell swoop. Easy!

There is no better way to set and manage expectations than by just checking in with your team and your clients.

Conduct Status Meetings

There is no better way to set and manage expectations than by just checking in with your team and your clients. Whether you're a one-man team or on a team of 20, working in an office or remotely, sharing progress is one of the most important things you can do in order to keep communications flowing.

Team Status

In general, a 15-minute in-person (or via Skype/phone) review of the day's tasks is a nice way to catch up with your team and can work to your advantage. There are several ways to conduct a status call, so be flexible and work with your team to determine what to do.

Simply go around the room and give everyone a chance to talk about what they're working on that day. A quick check-in will force everyone to organize project priorities prior to the meeting, adding to a feeling of accountability for tasks. Before wrapping things up, it's always helpful to ask, "Does anyone need help, or have time to help with tasks if needed?" Doing so helps you to build trust and rapport with your team.

How you approach status meetings will depend on the project you're working on, your team's schedules, and maybe even the intensity of the work. At some points in a project, you might feel like you need to check in a few times a day, maybe because you're handling lot of moving pieces or you need to make sure everyone is on track. Remember: communication is good!

Client Status

It's a good practice to keep an open, consistent line of communication with your clients. Ensure that you're staying current on all project issues by providing a weekly status report in the form of a written notification or phone call, and check in regarding alignment with project objectives.

Status reports not only help you and your clients stay on track, they also help keep you honest about your work, process, budgets, and issues. Making the time to sit down and discuss these things pays off in terms of your relationship with the client and with helping your team see it through to completion. When you conduct regular status meetings, you're ensuring that the expectations you established in the beginning are consistently reviewed and reaffirmed as you go through the project.

A Good Status Report Covers:

- What was done last week
- What is being done this week
- and next week
- Action Items
- Update on timeline
- Update on budget
- Potential project risks

Lastly, don't forget to have a bit of fun with your status meetings. Use the time to catch up with your team and clients on non-work-related topics.

Are you going to go over budget on a project? From a client's perspective, there is nothing worse than finding out about a project issue that could have been avoided until it's too late.

Use the status report and meeting as a way to communicate and discuss the issue. So pull that report together, hop on the phone and keep an open dialogue going.

Foster Good Communications

For project managers, it always comes back to being a good communicator and facilitator. If you've done your job, a communication plan lets your team know that over-communication is welcomed--your project will feel open. The team will always know what is happening, will set their own expectations, and will likely meet timeline and budget expectations without question. If your clients' expectations are outlined and discussed, they'll be happy that they've helped you to meet or exceed them, and will be reassured because they most likely know what to expect from the final product.

When you conduct regular status meetings, you're ensuring that the expectations you established in the beginning are consistently reviewed and reaffirmed as you go through the project.

Quick Tips To Keep Expectations In Check:

1. **Create shared to-do lists.** Lists always help to track tasks, milestones, and related deliverables. When your whole team has access, there's never a question about who is doing what and when to expect task completion.

TeamGantt tip: You can track sub-tasks as a team and keep each other in the loop on progress and dependencies with the list view in TeamGantt. With this feature, people who are responsible for getting work done on projects can simply click on the list view and filter down to the tasks they want to see and get a very simple list of tasks to work on. Try it risk free for 30 days

Once you've got your list documented, make sure you've clearly assigned responsibilities and check in on them. If you're seeing that a team member is behind, be proactive and comment on it through the shared to-do list. The point of an open list is to make sure that you're all up to date on the status of work at all times. A list like this will foster real-time communication, whether that be through in-person discussion, instant message, a TeamGantt post, or email. The idea is to work in the open and share progress to build team support. This is the type of activity that helps teams build trust and gain project efficiencies.

2.   **Don't worry about delivering bad news.** If you think something might go wrong, talk about it. There is no use in keeping worrisome news hidden. Be sure to always keep a "Risks" section in your Status Report, because the last thing you want to do is surprise a client with news that something is going over budget or past your timeline. At the end of the day, this is business and if you have the project's best interest in mind, you'll look for and be honest about those risks without question.

Keeping an eye on those risks can also help you to anticipate the needs of your team or your client before they even realize they exist. When you do that, you feel like you've won.

Don't be bashful about figuring out what you may not know or understand.

3. **Ask questions and listen to responses.** Don't be bashful about figuring out what you may not know or understand. Chances are, asking questions will help you and your team sort out expectations related to project requirements, feedback, processes, and even the client's happiness levels. When you hear an answer, don't take it at face value. Think about how it may impact your project--and follow-up with more questions (if needed, of course).

Did You See That Unicorn?

By now, you've realized that setting and managing project expectations is not as difficult and scary as it may seem. What it comes down to is that you must communicate early and often, document conversations, and continuously follow-up with the collective project team in order to keep things straight. If you passively let things work out on their own, you'll not only kill your project, you'll lose the trust and respect of your team. So be proactive in setting expectations and keep an open line of communication, and you'll find that sparkly unicorn. (Okay, maybe not...)

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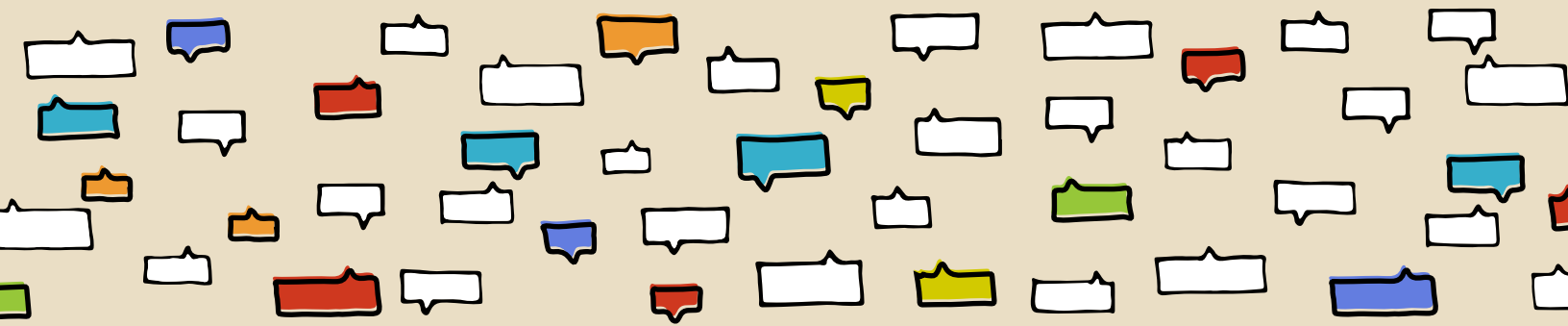
Managing Projects, Helping Clients

I f you're a project manager tasked with handling internal project operations as well as managing a client relationship, you will find yourself walking the line between being the project enforcer and the cheerleader. Sounds a bit like Dr. Jekyll and Mr. Hyde, doesn't it? It's not easy! And to further complicate the situation, you have to start over every time you get a new client.

As the PM, it can be difficult to know when you're needed, and when your best strategy is to step back.

It's a really tough balance for project managers; we want to step in and help the project at the right times, but many people think project managers get in the way. As the PM, it can be difficult to gauge that zone of perception—knowing when the team or clients need you, and when your best strategy is to step back. On any given day, clients and internal teams need to know why you're there, beyond some superficial need to fill a PM role. It's your job to balance the line between defending your team and the project, and making your clients happy. While the internal team may have a better view of what happens behind the curtain, it is your clients who ultimately feel the effects of good project management, whether they realize it or not. This chapter offers some tips on creating strong relationships with your clients while setting the stage for your team to do their best work.

If you're a project manager, get involved with the people and process, not just the paperwork!

Be Yourself

From that very first introductory call, you have to remember to just be you! Project managers often get so caught up in the (very important) details of projects that any semblance of their personality gets stuck in a project plan or a spreadsheet. BORING. If you're a project manager, get involved with the people and process, not just the paperwork! In the end, you'll be the one person with both a full breadth of knowledge on the project and a direct, engaging relationship with the clients and decision makers.

It's your job to balance the line between defending your team and the project, and making your clients happy.

At the same time, be sure to acknowledge the fact that your client has a life outside of the project—not only at home, but in the office, too. In fact, being a client can be really difficult. Many people who are acting as a client lead often are tasked with several responsibilities outside of your project. In fact, your one project could be one of many. So, you're lucky if you get a small percentage of your client's time. It's important to keep that in mind and have empathy for your client—and his or her time.

Once your project is rolling and certain business details are out of the way, make time to be a human. That's right: don't be afraid of small talk. Learn more about your clients—inside and outside of work. Do they have kids? A dog? Enjoy music or sports? It's amazing how quickly you can connect with someone and generate friendly conversation based on a common interest. Sure, it may take a few minutes out of your day, but using your time with clients to find common interests will help you (and your project team). Plus, building a rapport from the beginning of a project will only help you to communicate what may be perceived as sensitive information in the future.

Set The Stage For Good Communications

It can be said one million times, and never enough: good communications are critical to any project, and the best time to establish a solid practice is early on. While you're doing project research, get to know how your client organization communicates. Use that research to inform and determine how you will communicate. Be sure to use your standby practices of meeting notes, documentation, and status reports and meetings as a foundation, but tailor them to what will work for your clients. By taking the time upfront to create a tailored communication strategy with the client, you will build a solid foundation for the project and avoid miscommunication later.

After you've settled on a good way for your teams to communicate and make important decisions, make sure you become the person on the team who keeps the conversations flowing. With just a few tactics like these, you'll build lasting relationships and amazing projects.

Talk, Don't Type

These days, we rely pretty heavily on email and instant messaging. Sure, it's convenient, quick, and to the point, but there's a catch. You can say goodbye to any sense of humor or reflection of your true personality when you depend on written communication to interact with your team and clients.Every once in a while, it's great to actually hear what someone has to say. Pick up the phone at least once a week to touch base with your clients; a 15-minute status report call over the phone, or even by Skype video, can really provide a wealth of information. Be sure to listen to what your clients are saying, and how they're saying it. Pick up on their tone and react on the fly.

Tip : Keep in mind that while talking on the phone helps build rapport, it's important to ALWAYS document important conversations with thorough meeting notes. Be sure to include the meeting date, time, attendees, relevant discussion notes, and action items with deadlines.

As soon as they hear that you're listening and care, they'll feel your dedication and be more willing to share information with you. We all know that information is power, particularly in project management.

It's important to ALWAYS document important conversations with thorough meeting notes.

Listen Up

It's very easy to go through the motions as the project manager: schedule the meeting, get conversation started, take notes, document, and share information in writing and by phone.. What's missing in that list of "motions"? Listening. Take notes based on what's been said and what's implied. You have to let your clients provide you with the information that will enable you to do the best possible job, and sometimes that means being a better listener. Better listening reinforces with your client the fact that you are truly engaged in the project, share project goals, and honestly want what's best for the project.

Ask Away

If you're actively listening to your clients, you will have tons of questions that will help you to understand a number of things: their goals, impacts on the project timeline and budget, and even potential successes or risks. You should never be afraid to ask the client questions that will help the project—even if you're short on time. If you're limited due to the time constraints of a meeting, feel free to circle back to the topic in writing.

Tips for better listening

1. Make eye contact.

2. Don't interrupt; jot down a quick note on your thought and follow-up.

3. Wait for the client to pause before speaking.

4. React (It's okay to show expression, nod, or even say "uh huh", "interesting", "okay" when appropriate).

5. Summarize what was said in your own words to ensure you've understood the point.

And if you're not getting answers to the things you need, be frank with your client and tell them that they're holding up a potential decision—or success—on the project. That'll surely light a fire. Really, you're just being proactive and that's what a good PM would do.

Then again, timing is everything. Take cues from the room and know when it's appropriate to ask a question or revisit one. Being a relentless (and clueless) question-asker will kill the mood—and even a relationship. There is a delicate balance between getting info you need, seeming nosey (or annoying), and wrecking a conversation. For instance, if you're mid-conversation and you ask a question that changes the direction of what's being discussed, you may end up missing out on what your client was about to tell you. Be patient, PM, for the client will share what is appropriate in the context of a conversation. Wait your turn and you'll get the info you need...and more.

Be Honest

Transparency can really help when it comes to communications with clients. If you think about it, your clients are paying you or your company to complete a project. Why shouldn't they know everything about your process and how you make project-related decisions? Nothing is a secret when it comes to project work. Is something a challenge for your team? Discuss it with your clients. They may bring a perspective to the situation that you don't have and might even help you solve an issue. Including your clients in the decision-making process involves them and helps to build consensus on ideas before you've even presented them.

Be An Educator

If your project is being outsourced by a company, it's likely due to the fact that in-house expertise does not exist for your clients. That puts you in the position to take the lead and help your clients to make the right decisions. But they can't do that unless you're actually helping them to understand your process.

At the beginning of your project, explain your process at a high level. Run through a project plan line-by-line and actually explain what things mean. If your client is interested, explain what your team does at each turn of the project. This will help your clients to understand timelines and dependencies, which can potentially lead to faster, better decision making.

1. Start with a short history of the project and explain what has been done and how that has informed what is about to be presented. Be sure to highlight strategy, goals, and most all the approvals that led you to your current deliverable.

2. Before showing the deliverable, explain what it is meant to do and what decisions it will impact downstream on the project.

3. Present the deliverable thoroughly. Don't leave anything out—be sure to cover the thought process behind decisions, and the variations that were discussed. Don't be afraid to show enthusiasm for your work. Be sure to tell the people you're presenting to that you'll run through it once, holding questions for the end.

4. Wrap up your presentation with a series of guiding questions that will help your clients to contextualize their feedback and questions. This will go a long way toward keeping personal opinion and erroneous feedback out of the conversation.

5. Give people time to think and review. Then discuss.

6. Always receive formal feedback in writing and follow-up with additional conversations, if necessary.

This format not only helps your clients to understand the level of work and the process that has been followed, it helps them to make decisions based on what's important to the project. They'll be more inclined to provide feedback based on the context you've provided rather than give direction that was never discussed. If they do, it makes it easier for you, as the expert, to address questionable decisions and follow up with pertinent reasoning.

Managing Poor Decisions.

"Make the logo bigger" is feedback that a designer never wants to hear—but clients may still ask for it. If your client does ask for something that your team disagrees with, you can tactfully demonstrate why you think it is a poor decision and objectively inform them of its negative impacts on the project. As the project manager, you are in a position to ask why they're requesting something; use research or examples to support your case while steering them away from a less-than-ideal decision. Do it in an informed, friendly way, you'll likely have a better conversation about it.

Here's the thing about poor client decisions: you can do everything in your power to help your clients avoid them, and yet still fail. It happens. You need to know when it's wiser to give up and not drag out an argument that will ultimately kill all good will and create an awkward project environment. If things start to feel rough, you just have to give in. It'll suck, but you have to recognize that sometimes decisions are out of your control. And when you do, be sure to do it professionally and politely. It's fine to tell the client that the decision is against best practices or your judgement, but that you'll respect their wishes and keep working to complete the project. When it comes down to it, clients pay your team to execute a project for them, and their decisions stand.

If you're working with clients, you must speak their language, whether they're corporate or a start-up.

Build A Shared Project Vocabulary

If you're working with clients, you must speak their language, whether they're corporate or maybe a start-up. They have a way of communicating, and will use terms that you might not be familiar with. But being able to speak in a way that relates to the client's business sense and culture is crucial to successfully managing a project. If you immerse yourself in your client's way of working, you'll understand their business and decision-making process much better.

Tip : Start a Project Dictionary

When reviewing client documentation, pull out acronyms and terms that are often used, define them, and put them in an easily accessible document for your team to reference.

On the flip side, your clients will probably share the same difficulty in getting to know you and your work. So, make yourself accessible. Be sure to explain your work when you start your project, and never hesitate to define what something means. Of course, you can do this in a way that is not demeaning. Share the wealth of your knowledge and you'll arm your clients with a new understanding of your work and your industry. If you can share your own dictionary, links, videos, or books about your own subject matter, do it. They might not have the time to review it now, but chances are they'll keep it on hand for future conversations or learning opportunities.

It Always Comes Back To Business

No matter what you have in common, or what you have to learn about your client (or vice versa), you will always be able to bring conversations and project decisions back to your client's core business and how a project sticks to—or strays from—its goals. You should always be able to bring a conversation back to how it will impact the business or if it meets the stated goals of the project.

Be a Professional

It's simple. Gain a client's trust by showing them you mean business. Here are some basics:

- Always be on time and end on time
- Document and share relevant meeting notes
- Proofread everything
- Keep your project documents updated
- Ensure timely delivery of project milestones
- Ensure your team is using consistently branded documents
- Call in your experts when you need them

When you cut through the subjective conversations about the design or strategy of a deliverable (particularly when it comes to design) and bring it back to the project's core, you can change the tone and direction of a conversation. Keep that one in your back pocket, because it'll always earn you respect—particularly if you're always in alignment with those goals.

Have Fun.

Have a sense of humor? Use it in your work. There's nothing wrong with opening a status report or email with a quick joke or reference to a current event—as long as you know your clients' limits. Remember, you set the tone for the project — with your clients as well as with your project team. If your management style is fun and organized, you should get the same back from your teams, and your clients might appreciate some levity now and then.

What if my client sucks?

Your relationship with your client is really important, so it's worth dedicating a good amount of time to being a good partner. Put yourself out there, explain your intent, and hope for the best. Clients won't always be receptive to your help, but all you can do is be there and continue to put the project and its goals in front of everything else. Delivering on time and under budget will make everyone happy in the long run.

There's one warning that comes with the talking bit: make it appropriate. If your client wants to stick to email, don't force the phone on them. Set expectations for how you'd like to communicate but be flexible. And don't go overboard when you inject humor and non-project related discussion; at the end of the day your job is your job. No one wants to sit through the story of your child's first tee-ball game. Save that for granny.

At the end of the day, you need to show your clients that you're a professional and that you have heart. It's as much about perception as it is about your actual work. If you have one and not the other, you might fail. If you do your research, open up a little, and get your clients to do the same, you'll be off to a good start.

You'll meet the finish line with far fewer issues If you make an effort to connect with them personally, and you might make it easier for your organizations to work together again on a new project.

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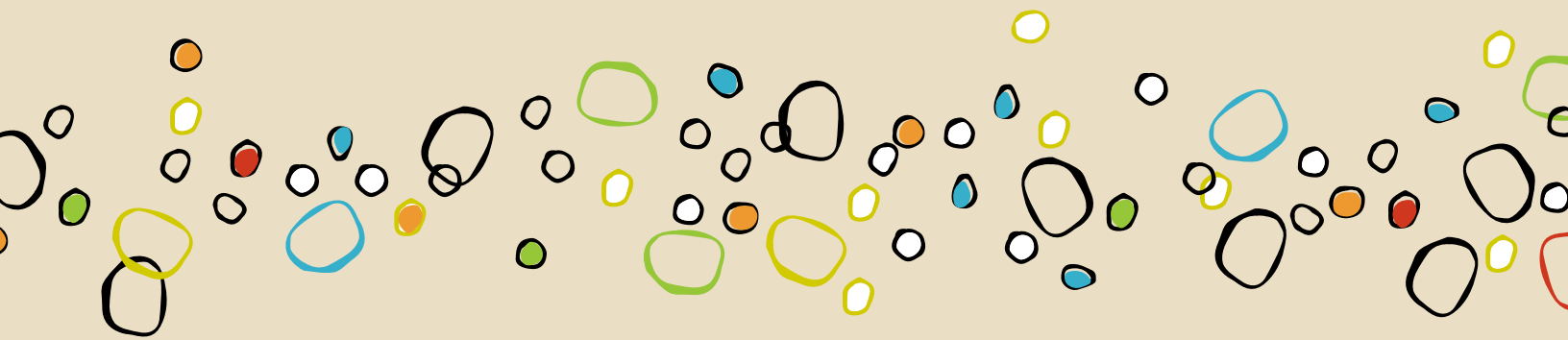
How To Put 'Me' In Team

No matter where you work, the perception of the PM role can be boiled down to embarrassingly low expectations. It's true, many people see project managers as robots who sit behind a desk and manage spreadsheets. They're simply referred to as budget and timeline jockeys. It's awful and highly inaccurate! As the PM, you know that you do a lot more than that. Even if maybe you're not the best PM in the word, you do more than that. So how do you turn that perception around?

You show you care by being there and doing more for the project, your clients, and your team.

Show you care by being there and doing more for the project, your clients, and your team.

That certainly sounds aspirational, doesn't it? It is, but there are very specific things you can do—outside of completely owning and ruling your timeline and budget—to genuinely gain the trust and love of the people surrounding you. Check out this list of (randomly ordered) strategies that will help you become the best PM in your organization.

Be Patient

They say patience is a virtue. Ain't that the truth? Being right in the center of a project means that you usually know at least a little bit about everything that's going on. So, when someone has a question, who will they go to? The project manager, of course. Be prepared to answer the same question 20 times. It happens. And it'll come from both sides—your team and your clients.

What does it mean when I approve something?
Where should I bill my time?
Why can't you get this done sooner?
When is that due again?

> **Quick Tip :** If you are being asked the same question by more than one person, simply send an email to the entire team, create a post in your shared communication tool, or bring it up in a meeting. Getting things in writing helps to create confidence, and certainly ensures that the whole team is on the same page.

These are all simple questions, and they'll be asked repeatedly. That's okay. Be patient with the people who ask them. You're being asked these questions because they trust that you actually know the answers. Own the fact that you are the source of reliable project information. Showing frustration while answering a simple question just makes you look impatient or rude.

At the same time, you have to be ready to deal with other peoples' lives. Stuff happens that no one can control, and those events will always impact everything you've planned and re-planned.While it can be incredibly frustrating, cause missed milestones, and potentially start a series of awkward conversations, life will always take precedence over your project. The best you can do when life events impact your project is be patient, rally the team together, and sort out a plan B.

The best you can do when life events impact your project is be patient, rally the team, and sort out a plan B.

If you can live by the values of "Keep Calm and Carry On" as a PM, you'll find that your team will not only come to you for advice and share important information, they will be inclined to include you in more conversations. As the PM, that's what you want, because being included means knowing more, and being able to easily plan for those unplanned events. So follow the golden rule: Be patient with people and don't get frustrated over the things you cannot control.

Having empathy for your team and understanding the work that they do is key in being a great PM.

Be A Cheerleader

Take a walk in your team's shoes and you'll quickly realize that creating documents, designs, code, physical materials—whatever it is—is not easy when you're under the pressure of a deadline and you want your work to be stellar. Sure, project managers feel that pressure, but it's not on the same level. So, having empathy for your team and understanding the work that they do is key in being a great PM.

> **Tip :** If you can, try to formalize processes for recognizing good work. For instance, add a "Job Well Done" section to your weekly or monthly status report. Or, if you work for a larger company, recommend that there be an internal system for recognizing good work. For instance, if a co-worker reports that someone did a great job, the person they're proud of for doing a great job would receive a gift of some kind (gift card, lunch with a boss, etc.)

If you really want to help ease that stress, don't just be the person who checks in on milestones and progress. Be the person who looks at the work and genuinely says, "Wow. You're doing a great job."

Being genuine is key here. If you force that kind of feedback, everyone will sense that it lacks a sense of authenticity and you'll lose trust immediately. Really, who wants to work with a fakester?

There are other ways to be your team's cheerleader without wielding pom poms:

- Shout outs in a meeting in front of people

- Tell your clients about how proud you are of them and the work

- Tell their supervisors in an email (and copy the person you're talking about)

- Tweet about them

- Write about them

No matter the situation, having at least one encouraging team member helps to create a positive work environment and produces better quality and performance. The project manager can easily be that person, because he or she sees the entire picture—team dynamics and behavior, work products, and presentations. So, own the cheerleader role and your team will love you for it.

Know Your Craft

No matter how you come into the role of project manager, you need own that fact that you are the one who is responsible for facilitating good process, taming the scope creep, keeping your team honest on time and responsibilities, and being the person who's constantly keeping an eye out for risks. That's only part of what you do as a PM, and it's a lot!

But if you're not a traditional PM or were never properly trained or certified, you can take some simple steps to help you get there.

Be the master of what works for you.

1. **Study methodologies**

   There are so many approaches to managing projects. Not all of them will work for you, but understanding what they entail will definitely help guide you to create a good process for you, your team, and your clients. You don't have to be a certified black belt sigma master of all, but you could be the master of what works for you.

   There are plenty of resources out there for people who are just getting started in project management. Be sure to read the blogs, buy the books, and find what resonates for you. You might even want to think about joining the Project Management Institute to take advantage of the variety of tools, templates, events, whitepapers, and articles they offer. The more you can absorb about methodologies and paths for getting projects of all varieties done, the better the PM you will be. Oh, and again, your team will trust your judgment when you're tasked with providing solutions on your process.

2. **Learn company procedures**

   Everyone does everything just a little bit differently. So, the best way to gain trust with your new coworkers is to adapt to the way they work. Onboarding to a new job as a PM can take a good 6 months or more before you're 100% comfortable. You have to learn a lot about how you should operate with respect to process, tools, communications, reporting, and so on. If you're leading a team and working with clients, you need to live and breathe your company's procedures. But learning them is never easy. You have to observe and ASK QUESTIONS to make sure you get it.

Practice Using The Right Tools

There are 5,000 tools for one job. There is no one single PM utili-tool that everyone uses. In fact, we all use different tools for project planning, communication, resource planning, bug tracking, and the list goes on. Not all products combine multiple pieces of functionality as elegantly as TeamGantt, and not all of us are lucky enough to have products with as much power at our disposal.

Regardless of which tools are in your PM toolkit, be sure you do everything you can to learn each one. Make the time to take tutorials and classes, and create test projects to test the limits of the tool. The better you know it, the faster you'll be.

Be a good conversationalist, a great listener, and show empathy for others.

Hone Your People Skills

It's a simple fact: You cannot be a great PM without people skills. Be a good conversationalist, a great listener, and show empathy for others. It's certainly no easy task, but if you take the time and energy to devote yourself to the people you work with, they will see that you not only care about the budget and the timeline, but about the people and process as well. If you can get your team and your clients to actually LIKE and RESPECT you, you've won half the battle.

Tip : If you're having a hard time getting to know your team, create one-on-one meetings or lunches and open up with some personal conversation. If you can find commonalities as human beings, you'll find comfort and trust as team members.

Don't Ignore Difficult Conversations

The difficult conversation is quite possibly the worst/most awkward thing you have to face as a project manager. Everyone on your team knows that the PM is on the front lines when it comes to hard conversations about risks and issues. they know that they certainly don't want to be a part of that conversation—that's what the PM is there for! But at the same time, they probably think that you share that fear. But you simply can not show that fear. Ever.

Tip : Prepare for the conversations, if you can. If a hard conversation is sprung on you, stay calm and ask for some time if you need it.

When you forge working relationships where people can trust you, they will share information with you that is not meant for everyone. So, be reliable and discrete; don't share what you've been told in confidence unless you absolutely think it will adversely affect the work. Simply listen and use it to your advantage in a positive way. Knowing your team through and through will help you. MAJORLY.

Bring Snacks

People love food. There is no denying it. It's kind of evil, but if you get your team dinner while working late, they're bound to work more and stay at their desks. Just being there to support the team and doing things they don't need to be bothered by in times of stress shows that you care and want to be a part of the work...even if it's minimal. Your team will always be grateful to have you there to help. And they won't expect you to be their servant or waiter. But if you keep it light and have some fun, doing little things like bringing some snacks to get you through the tough times will bring you closer as a team.

A great PM will be neutral like Switzerland by doing everything in his or her power to resolve issues and keep personal opinions (and emotions) far away from the team.

Vent (To The Right People)

When you're in the middle of a project, client and team frustrations suddenly become your problem. Sometimes it feels like you have the weight of everyone's stress on your shoulders but no one to turn to. A great PM will be Switzerland by doing everything in his or her power to resolve issues and keep personal opinions (and emotions) far away from the team. It's not easy to keep it to yourself when you're facing adversity, so find the right person on your team, or at your company, to vent to. Otherwise, you will explode from stress.

Be sure to vent to "the right people," because you want to be sure that you're not negatively affecting the people on your project team. It can impact how they feel about the work, the client, and the project. You never want to throw someone under the bus or reveal information that someone could possibly interpret in the wrong way. You have to have your team's best interests in sight at all times.

Taking a lighthearted approach will give your team balance.

Have Fun

Sure, the job gets stressful. But there is no reason to NOT have fun. Show your personality! Taking a lighthearted approach will give your team balance. You will always be worried about meeting a deadline or a budget, but you need to be yourself and be human. We're not talking about being the class clown or performing stand-up routines at inappropriate times. It's all about finding the opportunity to have fun on the job. Only you will be able to know how and when to have fun. Be yourself, relax, and it will come to you.

Practice Saying "No"

In many respects, project managers feel as though they are serving their teams. We generally want to help people. The problem is, we don't always have the time. That leaves an open opportunity to under-deliver. So remember, you're not going to save anyone time if you commit to something you can't give your all to. Say no or offer an alternative. There's always a plan B, and if you explain why you just can't do something, people will understand.

Proofread Everything

Quality and attention to detail is important. Timelines are always tight, so if you're in a rush to post something and you don't have a process for ensuring quality, you're going to deliver a typo. And that just looks bad! You can set up a process to nip any typos in the bud and help your team deliver a flawless product.

The facts are the facts, the scope is your guiding document, and you can find ways to justify your point. That, in effect, will make the conversation far less difficult. So, sidle up to the issues, build your case, and go into the conversation with confidence, and it won't be difficult. Better yet, no one can say you're not doing your job, because they trust that you have the guts to get through it.

Own Your Calendar

Never give in to every meeting. Rope off the time you and your team need every day to get your project work done. It's this simple: Mark yourself as busy and don't accept every

> **Tip :** Always make a meeting agenda and don't accept invitations without them!

meeting, call, or impromptu conversation. You have to protect your time to get your work done. At the same time, don't be totally inflexible, but make the case for why you need time away from meetings. Feel free to mention that a deadline is at risk. At the end of the day, if you can plan your team's time and protect them from miscellaneous meetings or tasks you will save them from a lot of stress.

Share Everything

If you have a hallway conversation that could affect someone else on your team, send an email or post to the team about it. This could be project related, discipline related, or possibly even affect long-term relationships with clients. For instance, if you hear your client's company might be sold, share it with the team and bosses. If you see a site using a cool technique that seems new and relevant to your work, share the link.

In general, sharing creates a more open, productive environment; people learn and absorb more. On the other hand, you have to be careful about what you share and when. If you're working well with your team, being a PM means more than being a traffic cop. It means being a friend, a pal, and a confidante. Like a Golden Girl!

Most PMs state they have an "attention to detail," so let this be your moment to prove it.

Be Concise

Email is disposable and long emails are deleted all too often. That being said, they can also be very important when exchanging key ideas and details on a project, so take care with how you craft your messages. Every time you start to compose an email, remember that you have a point to make. Stick to that point and don't add fluff. Keep in mind that you might only have a moment of someone's time. Be sure to take the right tone and make your point quickly.

Tip : If you have a lot to say, make an outline and write to it. Then edit it down. If it's feeling too long, or there's the possibility that the tone could be misconstrued, pass the draft over to someone you trust to edit.

Take Good Notes

Here's a good rule to follow: A meeting didn't happen unless there was an agenda and notes posted publicly. Many people go to meetings and don't take notes, and that's okay. Not everyone should sit down and scribe an entire meeting's worth of notes, but they should write down what matters to them. On the other hand, you should probably have someone on your team taking notes. In many cases the project manager can handle this task. Keeping track of the full discussion, salient points, and tasks or to-dos can be really helpful downstream.

Tip : Keeping up with conversations in meetings can be tough when you're taking notes. In order to keep things accurate, make sure your notes are public and editable/ trackable. Or, record your meetings so you can go back and listen for details.

Yes, a lot of meeting notes are never, ever re-visited. But every once in a while, there is a detail a client missed, or a conversation that was informally held in some other channel or found in notes posted to the team.

You'll be thankful you took notes and shared them with everyone (they will be too).

No one was ever trained on how to be a client.

Facilitate Useful Feedback

Great project managers facilitate a great process—from the inception of the project to the final delivery. A huge part of many projects is acceptance or approval of deliverables. It's a game of hot potato

Tip : If you downright disagree with feedback, discuss it. But be sure to handle it gracefully. Don't get an attitude, because that will never help anyone.

that project teams play with our clients or project sponsors, but you can always win that game if you set up a plan and communicate how you accept and iterate on or respond to feedback. For instance, will you set up a call to discuss feedback? Do you require that all feedback be provided in writing? Set those boundaries.

Here's the thing: no one was ever trained on how to be a client. So, if you take the time to explain your work and place some constraints around the kind of feedback you're looking for—or what will be acceptable within your scope—you're taking the time to coach them on process. If you tell them that it's going to affect the time you spend of the project, chances are they will make it better. Using little tactics like that will make your team happy, and will help your clients to truly understand the effort given to the work.

Understand What It Takes

You are the project manager. You are not the specialist who is building your project, but you need to understand the details of that specialist's work and the processes he or she takes to get that work done. That's a lot to study and understand!

The more you fully understand the work, the easier it will be to come up with a Work Breakdown Structure (WBS), and the better off you'll be when it comes to planning your team's time, talking about deliverables and dependencies, and even defending the work. So take the time on every project to break down tasks to the level of detail that you'd need to estimate time needed. For some helpful strategies on the WBS, check out Chapter Two of this Guide.

Stay Informed

If you really want your team to love you, you'll be tuned into the details of their work and how they play into your industry as a whole. Nothing builds trust or provides entry into team conversation better than being able to talk about what you all have in common: your work. So be aware of what is happening in your industry—and not just in your niche, because there are new innovations every day and they're going to impact the way you complete projects.

Tip : Wondering where to start? Ask your colleagues what websites, blogs, twitter accounts, and publications they read in order to stay informed. Maybe you can create a library or place where you can share links and ideas. (Remember that "Share Everything" section?)

At the same time, be aware of the new tools that are being released. They can have a really positive impact on the way you're working. If you're able to test them and find efficiencies, you'll be a happy PM.

Be Proud Of Your Role

This is the last tip in this chapter, and the most important. Please don't forget that what you do is important. You are the glue. You steer the ship. Be proud of that and own it.

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You'll certainly encounter times when you are made to feel less important because maybe someone doesn't see the value of your role, or because you didn't answer a question they way someone expected. It happens. Unfortunately, it is the burden you will carry as a PM. No matter what happens, know what you do best, focus on making it better, and fly your PM flag high.

Carry On, Sought After Pm

If you get your timelines and budgets in order early and maintain them often, you will find the time to focus on all of the revolving pieces that come along with managing projects. Maybe you can pick a few items off this list and focus on your own ways to make yourself become the PM everyone loves. If you do, it'll pay off and you'll never want to leave your team or your job. Imagine that.

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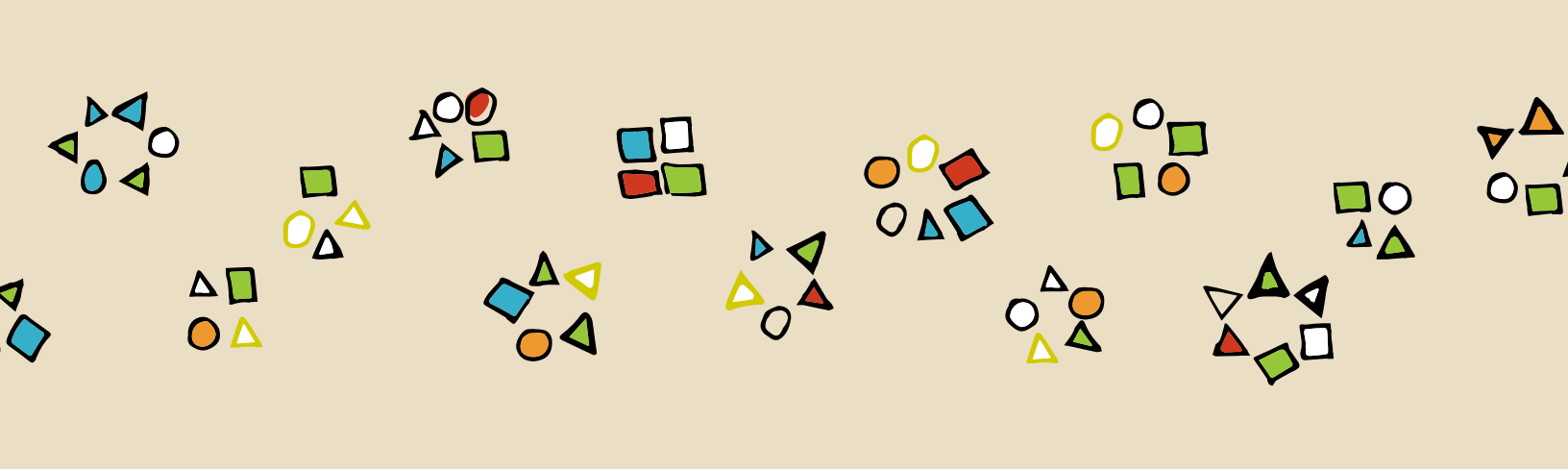
Master The Art And Science of Meetings

T here's no doubt that every project manager's day is filled with meetings. These can be meetings about projects, meetings with clients, ad hoc team gatherings, internal and client status meetings, and so on. The list of possibilities for work gatherings seems endless. That can be a problem! Too many meetings can mean lower team productivity, and too few meetings can cause strains in team communication and gaps in knowledge. There's certainly a tricky balance to find the right amount of meeting time, and it's tough to ensure that each will be productive.

Finding the right balance and offering the team value in each and every meeting often lies on a project manager's shoulders. But don't worry, you can become a PM Meeting Master by finding the balance between the "art" of communicating a meeting's importance and the "science" of how it's best managed.

Determining Meeting Value

Of course, there is no mystery in what makes a meeting successful or abysmally bad. Just scheduling a meeting can be difficult, what with ensuring timeliness of the discussion, navigating the issues at hand, and coordinating people (and their busy schedules). Plus, you have to deal with internal factors. For instance, in some organizational cultures, meetings are seen as unnecessary, or bad.

In others, they are healthy places to exchange ideas, or even to get work done. Whether you think they're good or a hassle, you should know that you, the project manager, can help determine the time, length, agenda, and value of a meeting.

Before you schedule anything, ask yourself, "What is the goal of the meeting?"

Before you "throw something on the calendar," it's best to think strategically about your meeting. Part of the reason many professionals sigh or grunt at the thought of a meeting is because they can been seen as an interruption in their day. Think about it—if you're working with a team who is making a product, they need a good amount of time to sit down and focus on what they're making. A meeting about something peripheral to the project can throw their concentration off very quickly. So how can you determine if a meeting is actually needed? Follow these guidelines:

1. Be clear about the meeting's goals. It may seem silly, but going into a meeting knowing what you want to get out of it will help you make decisions on who should be there, when it should happen, and how long it might take. Before you schedule anything, ask yourself, "What is the goal of the meeting?" and "Do we actually need a meeting to hit this goal?"

2. Who needs to be in this meeting? Look back at that goal. Is it something that your entire team should be involved in? Be sure to protect your time as well as your team's. The last thing you want to do is pull someone into a meeting if they are not needed. Think about it this way: "Will this person talk in the meeting?" If the answer is "no," they are off the hook. Tip: Never double-book someone for a meeting. If someone is unable to make a meeting and you can't find another time, approach them and ask them if they're okay with missing the meeting. Promise throrough meeting notes and offer a follow-up if you just need to make a meeting happen and the person is secondary in the conversation at hand.

3. What is needed to make this meeting a success? Give attendees everything they will need for this meeting in advance. Your best bet is to attach the information to the meeting invitation. This could include advance notes, handouts, documents for review, etc. The more prep you can provide, the more productive the meeting will be.

4. Does this meeting have to happen today, tomorrow, or even next week? Think back to that meeting goal. How will it impact your project, decisions that are being made, the people in the meeting (and the work they have going on), your clients, your budget, and timeline? There's a lot in play there! Project managers often think every issue is the most important, but when it comes to determining the best timing—or if a meeting can wait— take the time to think through those impacts and create priorities.

5. How much time do we need? Again, protect that time! If you only need 15 minutes, take it. If you need an hour and a half, that's okay too. Be sure to communicate the intent and value of the meeting to attendees so they come into it knowing that you're not wasting their time. Remember, you are the PM and you can control the calendar. If a meeting will stress your calendar, or your team's, you can take responsibility for finding a better time.

6. What is the agenda? Always create a meeting agenda, even for the shortest meetings. Be sure to include the meeting agenda in the meeting invitation, and add names next to conversation or presentation points so attendees know their responsibility for the meeting. Having an agenda will help you to stick to the meeting goals, formulate what potential to-do items could be, and keep the conversation on track. Tip: Never send a meeting invitation without an agenda. And don't accept meetings without them!

Make A Great Meeting

Once you've determined that your meeting will happen and you've set the agenda, it's up to you to make sure it lives up to everyone's expectations. No fear, you can do this! You can lay the groundwork for a highly productive meeting by establishing some rules, creating some roles, and addressing potential distractions.

Determine Meeting Roles

If your meeting is fairly formal, you'll want to make sure you have some basic roles and responsibilities covered. Read through the roles below and determine what's right for you and the people you're gathering.

Leader

The leader is the team member who calls the meeting and takes responsibility for communication before and after. In addition to being a participant, this person may guide discussion on all items or perhaps ask others to lead the entirety (or parts) of the meeting.

Facilitator

The facilitator keeps the discussion and decision-making process moving along. Typically, the facilitator is not involved in the content of the meeting—they guide conversation through the agenda and help the group with decision making.

Tip : In many cases, the PM may play all of these roles, as well as the participant role. It's a tricky balance. If you don't feel as though you can do it all, ask someone to help. Your best bet is to find someone to help you take notes so you can actively join in on the conversation.

Keep Meeting Productivity Up

All too often, attendees will show up with a laptop and/or devices in tow. It's really hard to disconnect these days, but if the people meant to be engaged in the discussion are

> **Tip :** Is your goal to make the meeting quick? Hold your meeting in a non-conventional space and run a "stand up" meeting.

sidetracked by what's happening on their screens, they will be distracted from your important conversation. If you're feeling brave, ask attendees to leave laptops and devices on their desks.

The Postmortem: A Meeting To End All Meetings

So, you've become a PM meeting master and all of your day-to-day meetings are running smoothly. Projects, on the other hand, can get rough. There are many factors that can create tension and cause delays, indecision, and confusion on projects. It's often hard to point to any of those factors, but it's pretty important to dig in and sort it out. That's where another meeting (or maybe two) can help. This time, you'll plan for more time, and the goal is to learn more about your own process and pitfalls—the to-dos are all related to your own improvement.

So what do you call this meeting? For the purpose of this chapter, we'll call it a postmortem. Some call it a project wrap up. Others call is a post-project recap. No matter what you decide to name it, know that a postmortem is one of the most important meetings you can conduct as a PM.

No one is perfect. No project is perfect. Don't ever forget that.

No one is perfect. No project is perfect. Don't ever forget that. Project managers can't fix every problem—much less, see everything coming.. But with the help of a project postmortem meeting, you can identify pitfalls and commonalities that create issues within your projects.

Recorder

The note-taker is a non-negotiable role in any meeting. Meeting notes are very important. Having someone to record general points made, action items, and to-dos is critical to the success of any meeting. On that note, meeting notes should be distributed as soon after the meeting as possible. It can be very helpful to store notes in a system where meeting attendees can review and update points made.

Timekeeper

If you want to be really expedient, ask someone to keep an eye on the clock. Start on time and end on time, and everyone will be happy.

> **Tip :** Record a meeting's audio or video if you think it may come in handy later.

These roles are only meant to be general guidelines. Not every meeting will even have enough attendees to make this happen! A general rule of thumb should be that the folks whose attendance is critical to the conversation at hand are in attendance with no additional "job" in the meeting. If you need help with moderation or note-taking, by all means, ask for help. After all, you're a PM, not Superman.

Create a meeting atmosphere where everyone is urged to contribute.

Be All-inclusive

There is no doubt that the best meetings the ones that are highly productive, and where everyone feels highly invested in the discussion and decisions made. You can't force that. What you can do is create a meeting atmosphere where everyone is urged to contribute, everyone comes away with new knowledge (or at least an opportunity to share knowledge or an update), and everyone is 100% clear on the next steps that need to be taken in order to meet the meeting—and project—goals.

With some additional thought and discussion, those issues can be fixed and we can save our teams and clients from a limited amount of strain when it comes to process, deliverables, interactions, and responsibilities. It's amazing how solid evaluation tools and some team collaboration can help you to get to the bottom of your process issues and help you work with great efficiency. That's where the project postmortem meeting comes in.

We Know You're Busy, But...

We're all busy! So many organizations don't take a moment to evaluate their work. Getting final approval (or a check) from a client or a project sponsor often feels like enough to just end the project and move on to something new! It makes sense—who wants to spend more time or money on something that is finished? The problem is, without some form of evaluation, you'll move right in to the next project and hit the same problems over and over again. That can't be what's best for your business or for your team. Improving the way you work or approach a problem as a team will not only make your team dynamic stronger, it will set the stage for greater overall quality and more room for creativity.

Make the time to meet with your team and evaluate your own work as a PM. A solid two hours is more than enough time to identify issues and create next steps or resolutions.

Make the time to meet with your team and evaluate your own work as a PM.

What Good Can Come Out Of It?

Postmortem meetings are not meant to create a negative working environment. Of course, no one actually likes to talk about their flaws (or anyone else's) in a public forum.

In order to make any progress, you need to talk freely and openly (not negatively) about how you can improve your process and as a result, your work product. Yes, you are going to talk about what did not work on said project, but the ground rules of the meeting should be set before discussion begins:

- Be constructive, not destructive.

- Don't get personal

- Cover all of your bases. Figure out what made the project simple, difficult, pleasurable, or miserable.

- Identify where the process works and where it breaks down

- Celebrate your successes and fix your flaws

While the goal of the meeting is to discuss issues and potential changes to process in order to alleviate those issues in the future, you need to keep it light. Talk about what you did well! Every attendee should know that the point of the meeting is not to point fingers at one another, but rather to the issues in general. If you set the ground rules and moderate thoughtful discussion, you can make everyone feel really good about the work that was done and energize them about the changes you are enabled to make.

As soon as everyone feels like they're in their "safe place," the comments will flow and you'll see how great it is to engage your team outside of the project environment to talk about the factors that affect the work product.

Add Some Structure

You don't want to just go in to the meeting and let people talk. That could get your team in a negative spot really fast. Instead, you need to structure the discussion strategically and make the best use of everyone's time. In order to know what is important or relevant to the discussion, you have to solicit some initial feedback from the team. You can do this in one of two ways:

Option One: Collect all discussion points by means of a survey or a team sit-down

Sample questions could be as simple as, "What worked" and "What didn't work?" or you could get deeper by asking your team to rate overall team performance on a scale of 1–10, based on agreement (1=I disagree, 10=I agree).

- Our team works effectively together (internally)
- Our team worked effectively together with the Client
- Our team members contributed equally to the project success
- Our team had one or more members who did not contribute an equal share
- Our project fulfilled the expectations of our client
- Our project fulfilled the defined project deliverables
- I consider the quality of our team's work to be high in quality

Option Two: Whiteboard your high-level thoughts

Sit down for a very short 15-minute session and simply ask your team to list "what worked" and "what didn't work." Go around the room to let everyone respond and record all feedback on a whiteboard. This meeting needs to be short and sweet, so only list items; don't let it become discussion. You'll save that for later on.

Make Sense Of The Responses.

Either of these information gathering methods seem to work just fine—it all depends on how much info you really want up front. Again, teams are busy, so adding a task like a survey (instead of a 15-minute meeting) that will get in the way of coding or designing just means that you're going to have to flex your project management muscles and follow up...repeatedly. But you have to do what works for you and your team.

> **Tip :** If you are managing a portfolio of projects, you might recognize issues that are happening across your organization. Use that knowledge to direct conversations and resolve common project problems.

After you've collected all of your feedback, sit down with the info and find the biggest themes that came out of the responses and develop an easy to follow meeting agenda. Create a Keynote (or Powerpoint) to lead the conversation during the meeting and be sure that the slides explain the overall issue and follow-up with specific comments where applicable. Sometimes having those facts to fall back to helps the team remember what was said, and sometimes can spark conversation.

The Meeting

It's pretty simple: you'll discuss what you've already prepared. But, there are a few simple rules to follow:

1. Have a facilitator to present the slides and stimulate discussion, as well as a scribe to take public notes and track action items. Also, have fun. It's a serious topic, but meetings like this benefit from a adding a fun twist to the approach.

2. Lead with successes. Why not talk about what worked first? Boost the team up and make a point to cheer your wins and innovations.

3. Make this rule clear: No finger-pointing, no negativity. You're there to resolve issues.

4. Make sure you give everyone a fair shot to weigh in during the discussion. Going around the room person by person can be painful, but it helps to make the conversation fair and balanced. No matter what, do your best at encouraging active, positive participation.

5. Leave the meeting with a set of action items and owners. You'll never improve anything if you don't act on what you discuss. Note that some things may require additional discussions. They're worth your time.

What Next?

You've met and identified the issues, so what's next? Where possible, implement change immediately. Did you think of a new way to present your work to clients? Test it out. See if it works. Maybe you identified a step in your process that was missing.

> **Tip :** Post comprehensive notes for everyone to see. Be sure to list all initial points from the team as well as your focused conversation points and next steps. And be sure to take those all into account when planning your next project.

Test it out. See if it works. The best can do is continue to iterate on what we do and tailor our own processes to what works for our clients and our teams. You'll always meet roadblocks, but you're always able to plow over them as a team. Conversations and meetings will only help you to surpass obstacles when they get in the way.

Conversations and meetings will only help you to surpass obstacles when they get in the way.

When it's all said and done, your projects might be put to rest but if you conduct a good follow-up meeting, your process will survive. With a minimal investment of your time and thought, your own project team (or CSI investigators) will quickly solve issues and improve your processes, your work, and maybe even team morale.

Carry On, Pm Meeting Master

There is no doubt that meetings are sometimes difficult to navigate—from scheduling them in the first place to following up on the action items that come out of them. There is an implied art and science to making them successful, but let's face it... only you can determine what is right for your project and your team. Use these guidelines at your own will and adapt them to what works for you. Always remember: A meeting's value is determined by those who participate.

As a team, you can work together to make every interaction valuable, whether that's in a 15-minute stand-up, a daily status, a presentation, a two-part postmortem meeting, or a simple hallway conversation.

Beyond 40 Hours: Continuous PM Learning

I t's really important for project managers to think of themselves as students. No matter what industry you're in, chances are that you're constantly facing changes—or new developments—in business, and that affects your scopes, processes, resources, and plans. One minor enhancement can change everything, and you need to keep up. So, PM, you better be aware of what's on the horizon in your industry, or you'll fall behind and wind up a dinosaur. But how do you stay on top of things and continue to be a good PM? There's only so much time in every day, and you do have a life outside of work. Here's a hint: if you're truly engaged in your work and you projects, it'll come easily.

Where To Learn

There is no doubt that there are plenty of project management resources out there for you to pick up. But what are the best books, blogs, twitter accounts,tools, and resources you should turn to? Don't worry, we'll get there! But you should also keep in mind that there are a lot of other factors to take into account when learning. We're not talking just about project management here, we're talking about other disciplines, industry-specifc news and developments, client news, and more. For example, as a Digital PM, I do my best to keep up on design, development, technology, and whatever else might come along and affect the digital/web industry, while also making sure to know what my clients' businesses are up to. So where do I turn for all the resources? Here's a handy list that could help you:

Project Management and Web Design Blogs/websites

There are a ton out there. This is in no way a comprehensive list, but these are a few that I tend to visit more often.

- PM Hut
- Herding Cats
- The Critical Path
- Arras People—How to Manage a Camel
- A Girl's Guide To Project Management
- projectmanagement.com
- Voices of Project Management
- Sam Barnes's Blog
- The Digital Project Manager
- Adventures in Project Management (Author's blog)
- A List Apart
- Creative Bloq/.net
- Smashing Magazine

Books

- The PMI Guide to the Project Management Body of Knowledge (PMBOK)
- Project Pain Reliever: A Just-In-Time Handbook for Anyone Managing Projects, Dave Garrett
- The Lazy Project Manager, Peter Taylor
- Managing Humans, Michael Lopp
- Making Things Happen, Scott Berkun

Twitter

If you're not on Twitter, go ahead and join. There are amazing resources, links, and conversations posted all day, every day. There are plenty of incredibly smart people to follow, but this list is a good start. Plus, you can follow some great hashtags, including #pmot, #pmchat, #dpm, #webpm, and more. Give it a shot—you will not be let down.

There is no better way to learn about process, practice, and people than while you're in the thick of it.

Learning On The Job

There is no better way to learn about process, practice, and people than while you're in the thick of it. As a PM practitioner, you should look at every day—every meeting, every conversation—as an opportunity to learn. Think back at the work you've done, and you'd probably be able to make a sizable list of the things you've learned while on the job. Maybe you're just starting out or your list isn't as long as you'd like it to be. That's great—check out the recommendations below and continue to develop as a strong professional PM.

When you ask the right questions of your client, you'll build a stronger knowledge base about their business and how your work can help them.

Research Provides Learning Opportunities in More Ways Than One

If your projects start with research—or if you have the opportunity to do your own research—you will find that it is full of learning opportunities.

When you dig into research, review previous studies and conversations, dig through documentation and analyses, and ask questions to truly understand what makes a client organization successful. You will learn a ton about how you can better manage your projects, because research yields insights about management, the construction of business goals, and your project's application to those goals.

If you have the opportunity, participate in stakeholder interviews. They can be incredibly eye-opening, as you can learn about everything from business processes to corporate hierarchies, to detailed market-research findings and first-hand, deeply personal stories. Each interview can be rich with information to be applied to our projects and also throughout your career.

Not sure where to start with an interview? Questions like these can spark unique and informative conversations with your potential on-the-job teachers:

- What is your experience with projects like this?

- What excites you about this project?

- Is there anything we should know about how projects like this one move through your organization?

- What factors could hinder this project's success?

Bottom line: When you ask the right questions of your client, you'll build a stronger knowledge base about their business and how your work can help them. And when you can also find a nugget that follows your own interests, that'll make for a conversation that benefits both your project work and your own education. Double win!

Jump In!

Another great way to learn is through necessity. If you have an opportunity to get your hands dirty and contribute to a project deliverable do it! Don't be nervous about messing up—ask the right person on your team for guidance and mentorship.

You'll go through critiques, questions, and revisions, and you'll gain a ton of knowledge about how the deliverables you schedule are produced and the amount of work that goes into them. Plus, throwing yourself into your work and learning on the job can be frustrating. But learning a new skill or new software feels rewarding and empowering.

Being inquisitive and sharing information on a team not only improves capability within a team, it builds trust.

Your Team, Your Teachers

One of the greatest benefits of working with a team is having access to knowledge outside of my area of expertise. As a project manager, you will have learned so much about your work and your industry through your project teammates. If you ever have a question about a technique or deliverable related to the project, just ask someone. Being inquisitive and sharing information on a team not only improves capability within a team, it builds trust.

Go Forth And Learn, Pm

No matter what you do or where you're employed, there are always opportunities to learn. Try looking outside your role and keeping up-to-date with business news, trends, and blogs. Nothing is more valuable, however, than closely observing situations, asking questions, and finding new learning opportunities during your regular 9-to-5. It can make the difference between feeling like you've got a job versus building a career. Let's face it, we all look forward to retirement. But if your career is successful in that you're constantly learning, maybe we should consider retirement as graduation.

Note from the Author: I hope you've enjoyed reading this Guide and will use it as your pocket guide to navigating your own project adventures. While this is the last chapter of this Guide, it is in no way the last you'll hear from me. I'll continue to write and speak on project management. Plus, beginning in January of 2015, I'll be consulting with teams and companies on all things related to digital PM and project strategy, so if you'd like to work together, please get in touch.