

# Secrets of an Elite Project Manager

Expert tips for you and your team to get things done

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# What's the secret to project management success?

Surely it is about having a solid understanding of what drives the business, don't you think? Or is it more important to master interpersonal skills – that instinctive ability to communicate, motivate and lead? Or perhaps it is all about having the right tools – knowing how to plan, delegate and track projects in an efficient way?

The answer is not one or the other. It's all three.

Undeniably, you need both the right skills and tools, as well as years of experience, to be able to instinctively manage a project. But experience takes time to accrue, and as you well know, time is money.

That's why we've gathered insights from three top project management experts, with decades of experience between them, to shed light into what goes into project management success.

Anyone can become an elite project manager, whether you're traditionally trained or came into the role accidentally. Fast track your way to the top by learning the secrets of the trade.

**Projectplace by Planview is a leading project and work collaboration tool. It was the first project management software as a service (SaaS) tool that pioneered the industry when launched almost 20 years ago.**



## Meet the experts:



### **Alan Lepofsky (@AlanLepo)**

is VP and Principal Analyst at Constellation Research, focusing primarily on the Future of Work. He has almost twenty years of experience in the collaboration software industry, helping organizations improve the way their employees work together.



### **Elizabeth Harrin (@PM4Girls)**

has over fifteen years' experience in leading IT, business change and process improvement projects in the UK and France. She is the author of three books and the award-winning blog [\*\*GirlsGuideToPM.com\*\*](http://GirlsGuideToPM.com).



### **Susanne Korta**

is the Director of the Florida Virtual Campus' (FLVC) Project Management Center of Excellence. She has over fifteen years of experience in project management and training coordination.

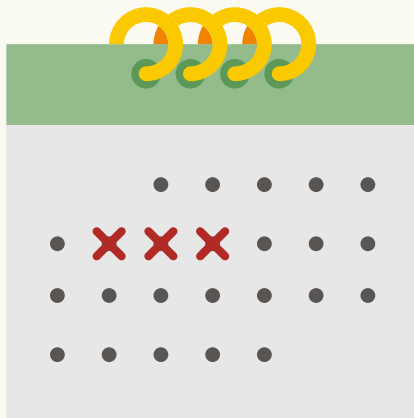


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# 1

## Start out right and plan for success

In the [Chaos Theory research](#), project managers across Europe revealed that inefficient [collaboration](#) and project management cost organizations 20 working days a year. In a similar study, survey respondents in the US said they waste up to 44 working days per year for this reason. The planning stage of the project is the opportunity to establish efficient working practices and set clear goals for your team so that these productivity losses don't creep in.



SUSANNE

*"Collaboration and communication are the most important factors that contribute to the success of a project. This is why it's so important to establish communication channels with both the internal team and the external stakeholders at the beginning of the process."*

*"There needs to be a clear vision of the objectives of the project and these need to be mapped against a defined set of deliverables. You also need to ask yourself what the consensus of completion is. How will everyone know when you're done? You need to establish clear goals in the planning stage so you can rally your team behind them."*

ALAN



#### ELIZABETH

*"If at all possible, do a pilot for your project, particularly if you are working on a software implementation project. It helps stress test your plan, identify any potential problems and can help you educate stakeholders on the potential challenges of the full project. It also means you can adjust your plan and template it for the future."*

## Project manager's checklist for planning



Map goals and deliverables against business objectives



Establish collaboration and communication channels for your team



If possible, pilot your project to adjust your plan before execution

# 2



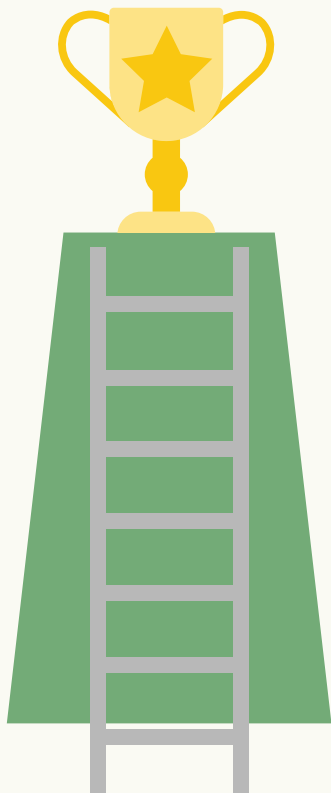
## Find the right tools for the job

Technology has revolutionized every aspect of business, and project management is no different. The challenge is to identify the technology, tools and methods that are best suited for you and your team's needs.



ALAN

*"People have argued for years whether technology or culture is the most important factor in getting things done. But both are equal and they should support a larger purpose. Any project management tool should make people feel like they are part of a team, not a cog in a machine. It should allow people to grab tasks they want to do instead of having them arbitrarily assigned. It should let team members see how they and others are making progress towards a common goal. That democratic feeling should be the true aim of any tool."*



#### SUSANNE

*"The biggest challenge with any tool or technology is motivating your team to use it. People are fundamentally afraid of change and will stick with what they're used to. But a little bit of proactive nudging, like asking someone to save a file within a tool instead of a shared drive, can slowly encourage people to start using that new tool. It might even be worth creating a "champions" group for anyone who is actively using the tool to support new users, shares ideas and encourage usage across the organization."*

*"Nothing is harder to start work from than a blank screen, so ideally tools should enable project managers to pre-populate the environment so that it's ready for the team to use right from the start. Similarly, managers should be able to easily turn projects into templates, so that repeatable projects have consistent structure and content."*

#### ALAN

ELIZABETH



*"Technology that we use in our everyday lives has impacted project management. People can instantly look up any piece of information on their phone and your project management tool should be no different. Similarly, the popularity of image-led platforms like Pinterest should encourage you to choose a tool that presents information visually."*

## Project manager's checklist for finding the right tools



Employ technology that empowers your team to self-organize their tasks



Encourage your organization to adopt project templates



Find a tool that works seamlessly across mobile and desktop devices



Encourage adoption with "champion" groups





# 3

## Get down to the execution

When it comes to executing on a project plan, the trick is to find a means of streamlining processes and communication so waste is minimized. According to our recent [Powering Productivity](#) research, inefficient processes (44%), too much paperwork (43%) and meetings (41%) are the biggest causes of wasted time on a project. How do you ensure that you and your team actually get things done?



#### ALAN

*"The best project management tools are like special effects in movies – you don't even notice they are there. Any tool your team uses should seamlessly blend into your workflow. In sales, the tools need to be linked to your customer records. If you're a software engineer, it needs to be linked to your GitHub. This way, any activity a team member carries out on a project can be linked back to the overall goals and deliverables. Not only can you see it, but the team can too! It makes everyone feel like their work is contributing towards something tangible."*

#### SUSANNE

*"Technology is just a tool for planning and managing the project. It can help you visualize what you need to do so you can achieve your goals. It can make objectives more visible and streamline processes. But people are the real resource. The tools can help you execute, but they should always be in service to the team, the people."*



#### ELIZABETH

*"For a project manager, sometimes execution is about being able to delegate. Your team is there to do the work. Your role will often be to make sure everyone knows what they are doing and to make sure the objectives are clearly defined. Don't think that you should be above taking notes in meetings, for example, if it will give you a better overview of the whole project and help you keep your team on track. That's your role as a leader."*



## Project manager's checklist for execution



Utilize tools that fit seamlessly into your workflow



Visualize tasks and goals for your team



Delegate tasks to your team and keep an overview of the entire project



# 4

## Get the best out of your people

When you are managing a project you're also managing people. It's a significant, but often overlooked aspect of the role. Finding ways to motivate your team is a huge part of the job, as engaged teams are more productive and deliver better work.



ALAN

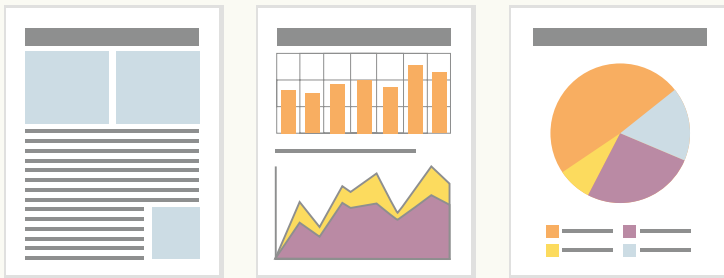
*"People want recognition even more than they want rewards. We used to think giving a \$25 gift card when someone did a great job was what they wanted, but now we're finding non-monetary models of reward carry more meaning. We now have tools that make it easier to compliment people for their efforts, and if this recognition is visible to all of their peers it becomes an even more powerful motivator. So always recognize the work your peers do, it will come back to you."*

**ELIZABETH**

*"Remember that managing people takes up a lot of time. Checking up on people, ensuring they're doing their tasks, helping people with problems - the hours stack up, especially on big projects. It's up to you how you handle all this communication, but over the phone or in person is ideal because it's immediate. Avoid email unless it's after a meeting and you're including actions in the email."*

*"Constant communication with your team is the key to keeping them motivated. Have regular meetings and catch ups - not just with the group, but with each individual. See if there's anything they need. Your team needs to know that you know how hard they're working! This is where having a workload management tool can really help – people can quickly flag whether they've got too much on and you can step in to help."*

**SUSANNE**



*Help people understand why they're doing something and how it fits into the larger picture. Part of this involves understanding what motivates people and what their priorities are. For example, if you're managing a healthcare project, many of those involved will likely prioritize patient care. On a financial project, staying within budget, or staying compliant with regulations, will be important to those involved. Understanding these different priorities can help you leverage them to motivate people.*

ELIZABETH

## Project manager's checklist for managing teams



Recognize peers for their work  
where everyone can see it



Understand what gets your  
team going and use it to  
motivate them



Keep your team motivated with  
frequent communication

# 5

## Report on success

It's difficult to decide which KPIs should be measured to determine the success of a project, as it will differ from project to project.

But determining how you will report on success is crucial, especially as doing so will generate learnings for future projects.



SUSANNE

*"You should figure out your KPIs at the beginning of the project, whatever they may be. And you should revisit these once the project is over to see how you performed against them. Is there anything you could have done better? Are there learnings that could help you avoid issues in the future?"*

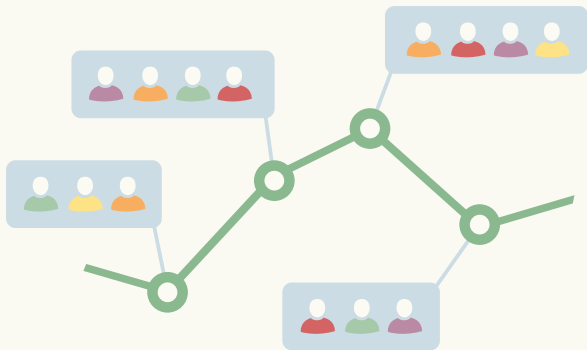
*"You should never be trying to directly measure the ROI of project management. Nobody measures the ROI of email or collaboration, it's too intangible. You should be measuring the KPIs of the business outcomes of the project being managed. For example: Are products being developed in less time? Is sales training and enablement reaching more people? Are marketing campaigns generating more leads?"*

ALAN

ELIZABETH

*"Measure customer satisfaction. Cost and timing KPIs are important, of course, but the true measure of success of a project is whether the project met the customer's expectations. Have a customer satisfaction score out of ten, it will help you understand what your stakeholders are prioritizing and you can adjust how you manage the project accordingly."*





#### ALAN

*"With modern project management tools we are approaching the age of the "quantified employee" – where you can collect data on who has done what and with whom and how long it took. You can take this data and feed it back into your project planning, identifying not just individual superstars in your team, but which collections of people work well together."*

## Project manager's checklist for reporting



Define the KPIs at the start of the project and revisit them at the end



Base your KPIs on the outcomes and deliverables of the project



Measure customer satisfaction

# 6

## Keep the customer happy

In an increasingly sophisticated global business landscape, potentially hundreds of people can be brought together on a single project. Everyone from the project sponsors to your internal team will have different expectations and managing everyone's needs can be a difficult balancing act.



**ELIZABETH**

*"All stakeholders are different and each will need a different approach. The main challenge is to work out who the key stakeholders actually are and tailor your plan to suit them. The best stakeholder relationships are always the ones where you go out of your way to make their lives easier. If you delight your customers in this way, if you are doing something that's genuinely benefitting them and changing their life, they are more likely to stick with you if things hit a bump."*

*"Use project management tools to be transparent with your stakeholders. Whereas before stakeholders never had sight of your time or resources, now we have platforms that can roll up the project deliverables into a dashboard you can share with everyone. Stakeholders can have a granular, real-time view of how far along the project is, what tasks have been completed and by whom. This transparency and accountability will help them manage their own expectations."*

**ALAN**

SUSANNE



*"Most problems on a project come from unclear sponsor expectations. There are usually lots of levels of leadership that need to be kept satisfied and informed of what is going on, which can make managing these expectations tricky. Once again, the key is good communication, so you can ensure everyone has a clear understanding of what the customer expects."*

## Project manager's checklist for stakeholder management



Take your stakeholders' expectations into account when building your plan




Be transparent with your stakeholders and manage their expectations



Use dashboards to regularly update stakeholders on project progress

# Elite project manager's checklist




## Plan for success

-  Map goals and deliverables against business objectives
-  Establish communication channels for the team
-  If possible, pilot your project and adjust the plan before execution

## Use the right tools and technology

-  Employ the right tech to empower team members to self-organize their tasks
-  Encourage use of project templates across the organization for simplicity
-  Encourage adoption with "champion" groups

## Execute brilliantly

-  Utilize tools that fit seamlessly into your workflow
-  Visualize tasks and goals for your team
-  Delegate tasks and keep an overview of the entire project

## Manage your team



Use visible recognition as a workflow motivator



Understand what gets your team going and use it to motivate them



Keep in constant communication with your team

## KPIs & reporting



Define the KPIs at the start of the project and revisit them at the end



Base KPIs on project outcomes and deliverables



Measure customer satisfaction

## Keep the customer happy



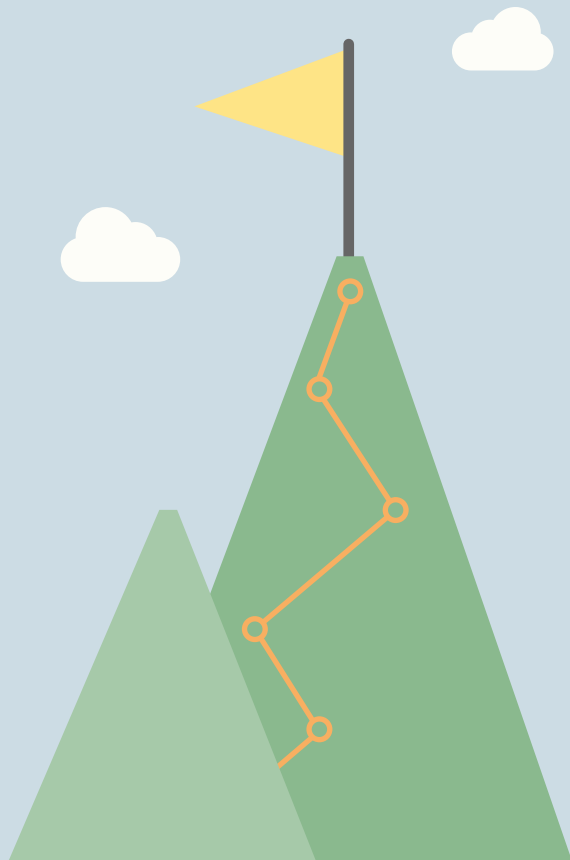
Take your stakeholders' expectations into account when building your plan



Be transparent and manage people's expectations



Use dashboards to regularly update stakeholders on project progress



## Want to learn more?

Get even more relevant tips by watching our [“Project manager’s guide to getting things done” webinar](#) – available for free on the Projectplace website.

Watch the Webinar



Or sign up for a free  
14 day Enterprise trial:

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Read more in the “Project manager’s guide to getting things done” eGuide series:

- Part 1: [How to set goals, organize teamwork, and measure success](#)
- Part 2: [How to manage your team’s workload](#)

### ABOUT PROJECTPLACE

*Projectplace is a smart work collaboration solution from Planview that brings teams together to get things done. Launched in 1998, now with over 1 million users, Projectplace enables virtual teams to plan, organize teamwork, execute work, communicate and share documents in one tool. It provides a unique combination of Kanban-based task management and Gantt chart planning, giving project managers a complete visibility into the status of ongoing initiatives.*

[www.projectplace.com](http://www.projectplace.com)