Project Management for Non-Project Managers

Not every company has a dedicated project manager or a project management process.

But, almost everyone in your company manages projects on a daily basis. Take a marketing manager for example. She has to collaborate with multiple teams and coordinate work across copywriters, designers, and web developers to launch a new website. The deadline seems elusive as more work piles in.
How does she keep everything organized? Project management, of course!

Project management happens in five phases: **Initiation**, **Planning**, **Execution**, **Monitoring**, and **Closure** (more on this later).

Now, think about how the same marketing manager goes about executing an email campaign.

She brainstorms ideas for the campaign and comes up with a plan identifying the people who are going to work on it. She then sets the KPIs and goals. Someone works on the email copy, designs it, and sends it to the email list. She keeps tabs on the open rates and click-through rates over a period of time. Once the campaign objectives are met, the campaign is archived.

When the designer works on the email design, the initiation and planning stages happen on a whiteboard or inside her head. She designs the email and gets feedback from her peers. Once the design is approved, the "project" is complete. Do you see the pattern here? The steps can shrink and fuse as the tasks move further down the funnel but always conform to the five phases.

Initiation

Planning

Execution

Monitoring & Controlling

Closure

# Are you (secretly) a Project Manager?

If you create plans, budgets, and goals to get a specific job done, organize a bunch of tasks on a daily basis that need to meet deadlines, coordinate with multiple people, and oversee work execution, then congrats, you're a project manager, albeit a secret one. You could even give yourself a pat on the back for your new-found title: **The Non-Project Manager.**

The non-project manager could be in engineering, sales, or customer support. They didn't go to a fancy business school and don't have a project management degree or drown in Gantt charts. However, they're frequently engaged in the planning and execution of tasks that span across a period of time.

We believe project management is a universal skill that anyone can adopt irrespective of the nature of their job and title. While you need not get drowned in methodologies and frameworks, it helps to understand a few basic principles of project management and implement them.

P.S: We're gonna refer to you as the project manager throughout this book. Get used to it.
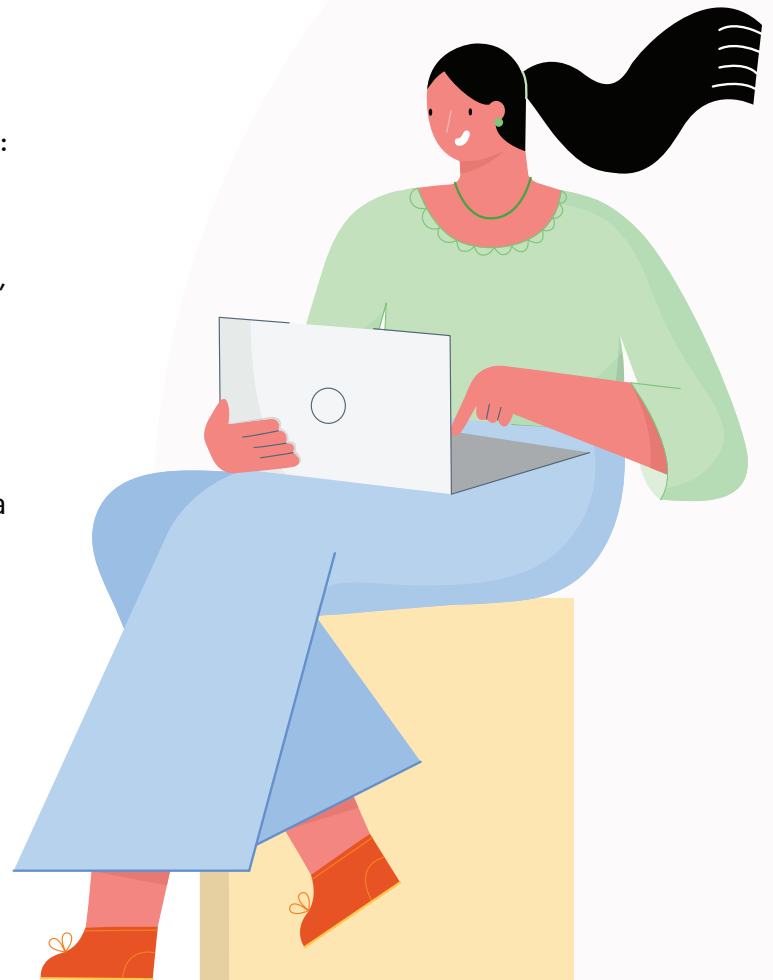
Contents

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Chapter 1
What Is a Project?

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A temporary endeavor undertaken to create a unique product or service.

Project management has been around for as long as humans have existed, from the invention of the wheel, to the construction of the Giza Pyramids, to the development of the device you're reading this on. All these "projects" required planning, had specific people to oversee them, a sponsor, and people working on them. We just didn't call them projects.

The scope and workload constraints weren't considered back then but there would have been budgets and timelines. The practice became more refined in the last 100 years with several methodologies being developed.

What exactly is a project?

A project is a sequence of tasks that must be completed to attain a certain outcome. A project is usually a temporary endeavor with a definite beginning and end. There's a completed product or service at the end completed within certain boundaries and constraints. Depending on its complexity, it can be managed by a single person or hundreds. This is the Project Management Institute's definition of a project. Let's break it down.

Note: Over the years, the definition of project has evolved to the point where it can go on forever. Maintenance projects are good examples of this. Project management methodologies have been adapted to day-to-day work as well.

Any project is bound by the scope, the timeline, and the allocated resources, monetary or otherwise.

Let's say your company is participating in an event and you're a premier sponsor. You'll need to get the webpages, the goodies, and brochures done. You'll also have to schedule social posts and coordinate with the hosts, vendors, and internal teams.

The event is the project. It spans a definite time period. Your company gets more prospects and press out of this event. It has time constraints as well as budgetary constraints. Multiple people are working together to complete this successfully. See how it conforms with the PMI's definition of a project.

The three components of a project

Scope
(Features & Functionality)

Quality

Cost
(Resources & Budget)

Time
(Schedule)

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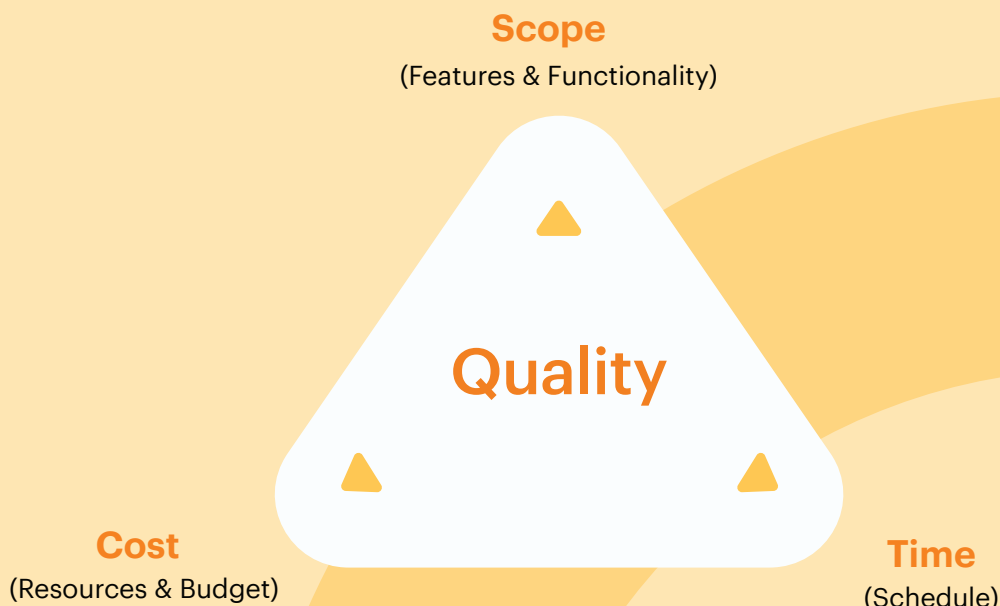
The diverse nature of projects

Projects come in a wide range of shapes and sizes. A project can:

Be big

Like the construction of the Hoover Dam, taking years to complete, and have a humongous budget

Be small

Like your weekend project of installing a pathway in your lawn

Involve many people

Like planning a wedding

Involve just yourself

Rearranging the photos in your wedding album

Project is not a process

A project is often confused with a process. A process is a series of routine, predefined steps to perform a particular function, say, expense reimbursement approvals. It's not a one-off activity. It determines how a specific function is performed every single time.

Processes are system-oriented while in the case of projects, people define the next stages. This is a direct result of the required flexibility and ad-hoc nature of some projects.
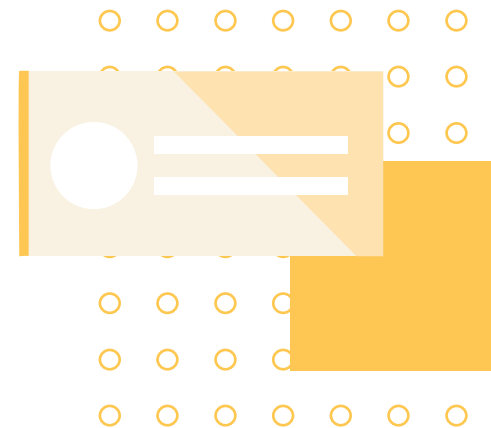
To sum things up

- The project has a definite start and end date.

- It creates something new.

- It operates with certain constraints.

- It isn't business as usual.

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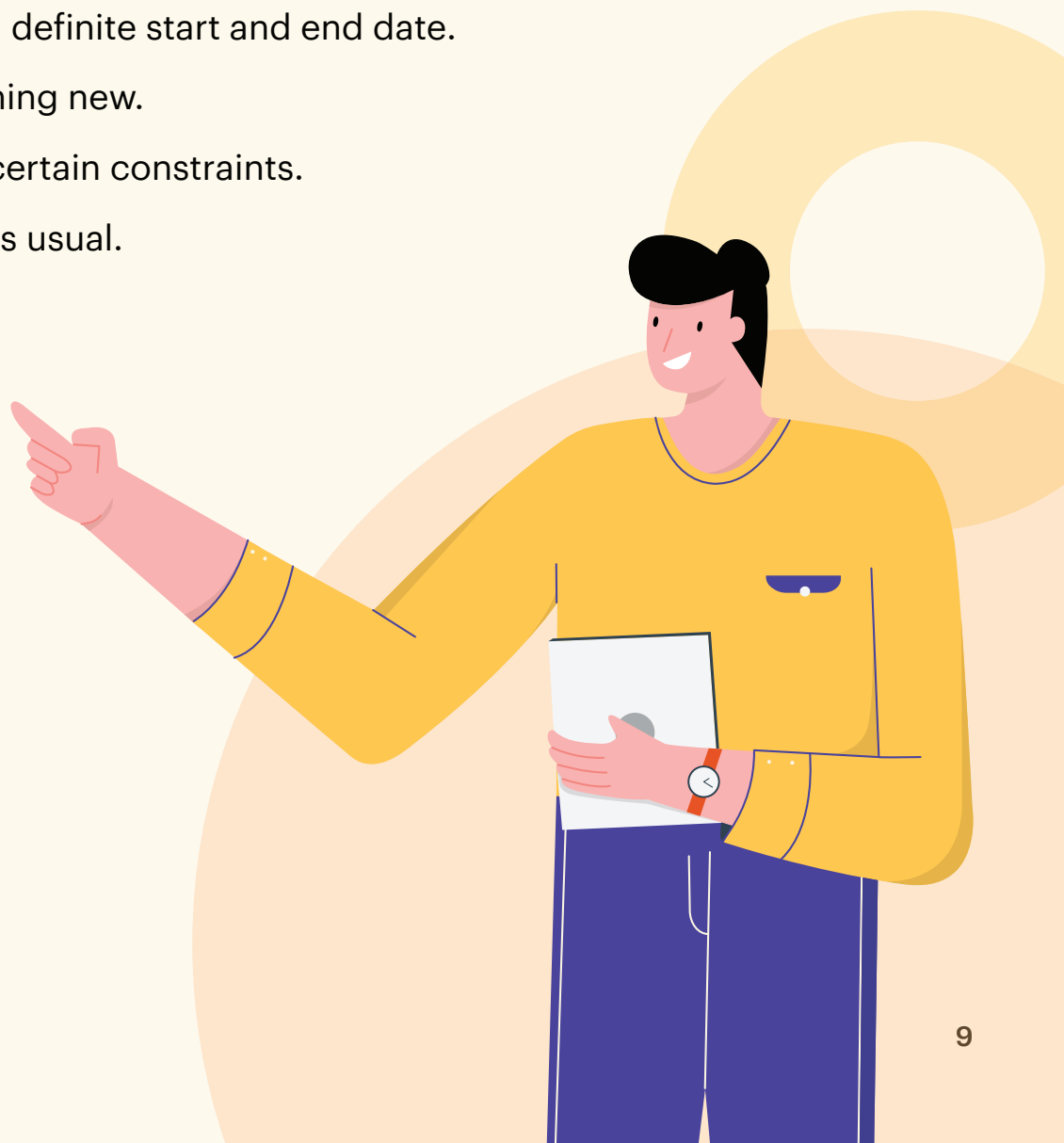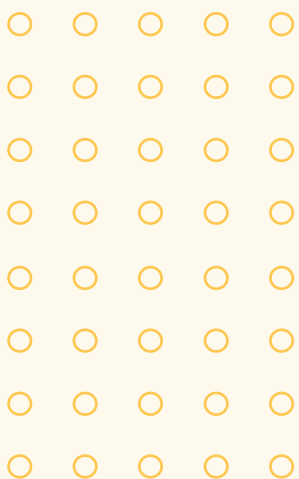
What Skills Do You Need to Be a Successful Project Manager?

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It takes a mixture of traits for someone to be a successful project manager. You'll need to be a master of delegation, communicate effectively, and exhibit leadership to name a few.

Anyone who has been given the opportunity to manage a project needs to have the following key project management skills:
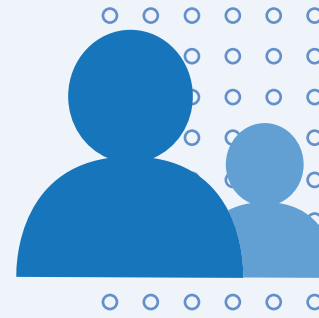
Leadership skills

As a project manager, you must understand that there is a huge difference between managing and leading. Management is following certain established processes and project management methodologies and ensuring others follow them too. Leadership, on the other hand, requires both management skills and emotional intelligence. It is the responsibility of the project manager to empower and inspire team members.

Effective communication

This is another soft skill that goes hand in hand with effective leadership. No matter how good a vision you have or how much you want to inspire your team members, it will all be moot if you can't get your point across clearly. Additionally, a large part of a project manager's time is spent while dealing with stakeholders and external parties like vendors and contractors. All of these tasks require you to be an expert at effective communication.

Planning and strategic thinking

This is a business management skill that is absolutely critical for any project manager. All typical tasks of a project manager like organizing and prioritizing tasks, monitoring progress, and making decisions based on situations, require a certain level of planning.

Another critical skill that is somewhat related to planning is cost management. Every project comes with a monetary constraint. With proper project planning, you can make sure that your project remains safe from unnecessary delays and budget shortages.

Team management

A huge part of managing projects is managing people. You must efficiently use all the resources available, and your team is the best resource you have.
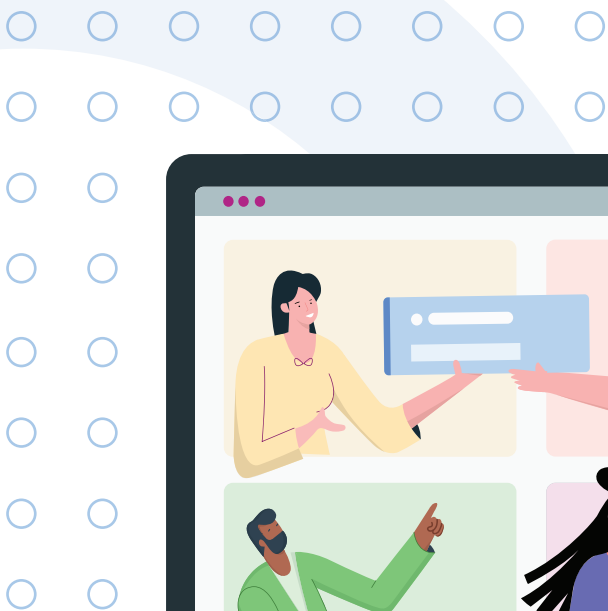
Time management and scheduling

"Time is what we want most but what we use worst". Even the simplest tasks require effective time management so it's obvious that your projects will also need it. You'll not only have to plan your own time but also your team's.

Task management skills

By now you must have realized that all these required skills are interconnected. Together with scheduling, task management is a pillar that holds a project together. You can plan as much as you want, but if your project tasks are not clearly organized, the project will either fail or take too much time.

As the project manager, you'd need to know which tasks can be worked on simultaneously and which tasks depend on one another.

Recognizing these small details and coming up with the most efficient system is what distinguishes an effective project manager from the crowd.

Risk mitigation

Risks are unavoidable no matter how simple your project is. Reduce the possibility of risk by having an effective plan in case something goes wrong. Skillful project managers generally identify potential problems before they occur and come up with a risk mitigation strategy.

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Expert negotiation skills

All stakeholders have a slightly different agenda. As a project manager, it's your job to negotiate terms that are acceptable for everyone. In order to create a win-win situation for everyone, you'll have to know when to compromise and when to stand your ground.

The job requires you to constantly create situations where you get what you primarily want while making some compromises to convince the other person that they are getting something out of the deal too.

Project managers need to have good negotiation skills. You will have to find middle ground with your company's management in order to get the required resources, negotiate achievable timelines, handle other stakeholders, and expertly manage your own team.
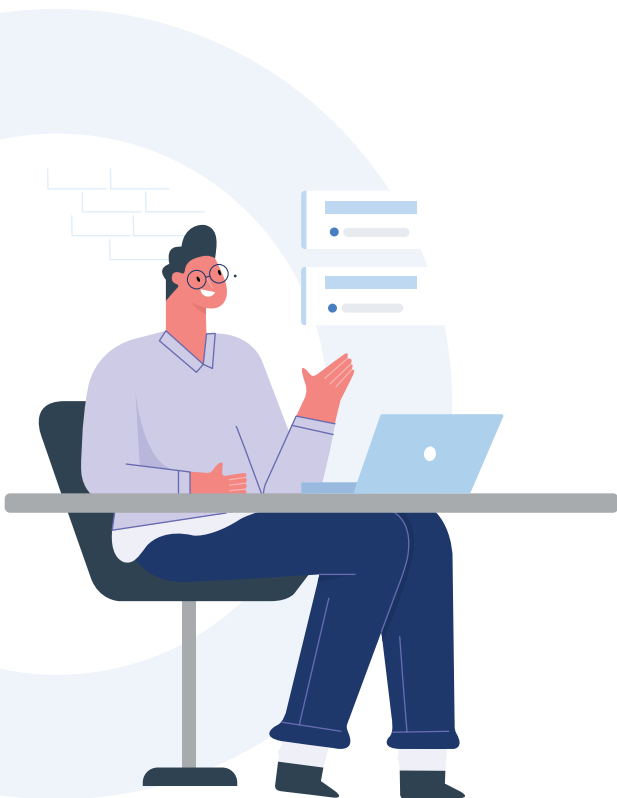
Being tech-savvy

Modern project management is not an easy task and it requires a combination of project management skills and the right project management tools. These tools make your life a whole lot easier.

An intuitive project management tool like Kissflow Project will help you keep track of progress, organize tasks, and collaborate effectively.

Chapter 3

Building a Team Based on Transparency

While some managers feel that providing transparency poses risks to the project, the benefits of transparency far outweigh these risks. It is true that personal data of both employees and clients must be protected, and not everyone needs access to contract details and similar legal documents. Outside of those areas, concerns about over-sharing information usually stem from unhelpful fears.

If a culture of trust and transparency is established, companies can share proprietary information with employees, and team members can communicate honestly about their ideas and progress. Project transparency leads to better outcomes for both the team and the project itself.

Let everyone see the big picture

Everyone wants to understand how his or her part contributes to the larger goals of the team or company. By giving your employees visibility on the overall progress and scope of the project, each person can see how his task fits in as well as what other team members are relying on him to finish before they can complete their part.

In task management, if the whole team can view task status, a team member can jump in to help an overwhelmed coworker instead of turning to the manager to complain about slow progress. Giving every team member a view of the big picture by monitoring project progress encourages collaboration and initiative-taking.

Make collaboration easy

Teams that collaborate well get better results, and a key factor in collaboration is communication. Open communication breaks down silos on interdisciplinary teams and keeps individual team members from working in isolation (even if they're working remotely). Strong collaboration tools enable teams to identify and solve problems more quickly.

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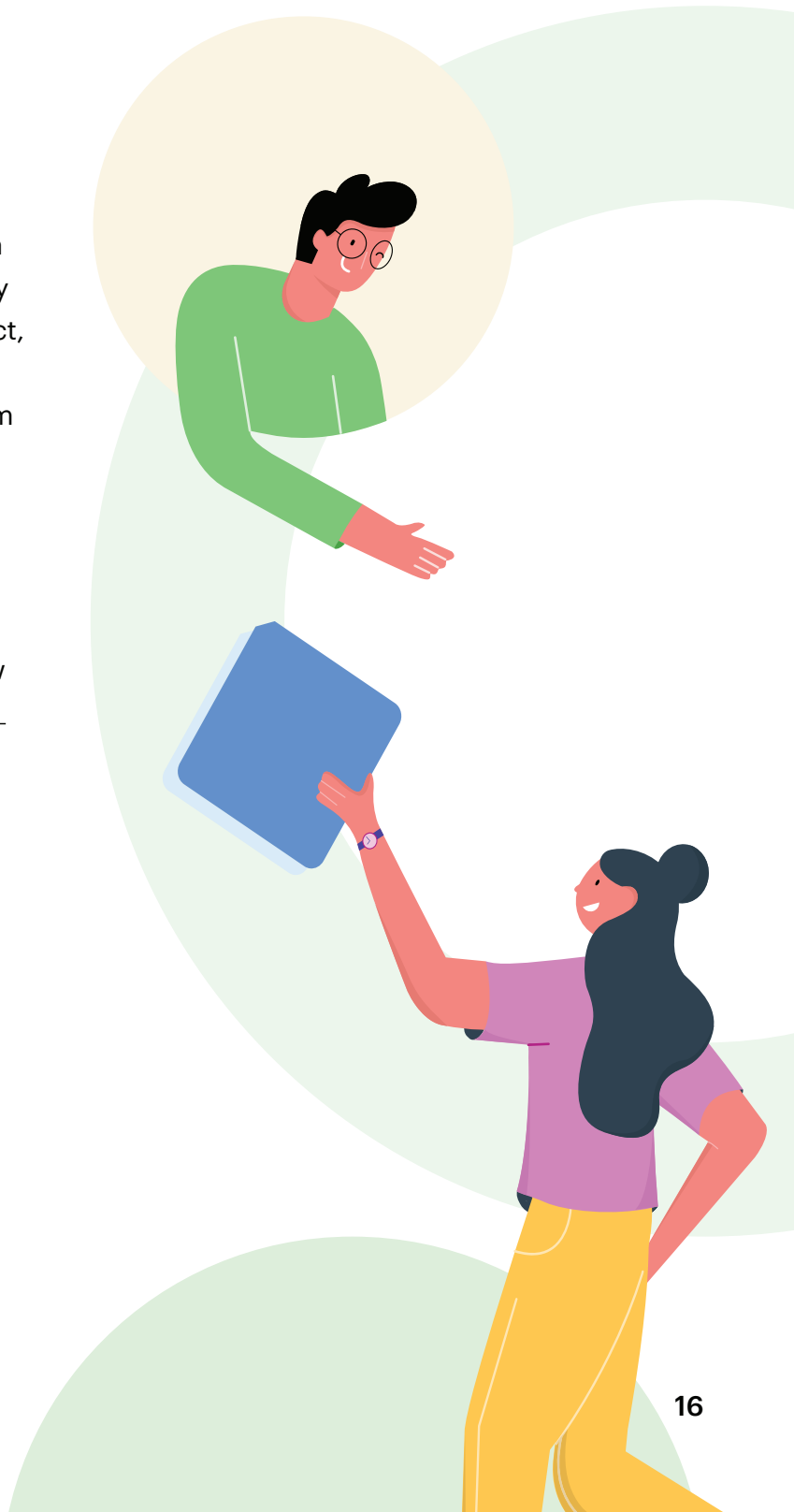
Share calendars

It may seem obvious, but it's really helpful if everyone knows when things are happening.

- What is the stakeholder's schedule and how does our project play into the bigger picture for them?
- What is the timeline for each task in our project?
- Who's going on vacation next week (and how can I help fill in the gap)?
- What events are coming up that might affect our work schedule?
- Much time and frustration can be saved if everyone on the team knows what's on the calendar.

Let them see the data

Ever seen a report at the end of a project and thought "well if I'd known that before..."?

Project managers must fight the impulse to keep report data and other information siloed. When everyone on the team has the ability to track project progress, run reports, and access data easily, each person is empowered to make better decisions and stronger contributions. Giving everyone access to project data gives every team member ownership over the project and the ability to see how their work is contributing to the team's progress.

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Why Do Most Projects Fail?

"Even the best laid plans fail.

The good news is that you can catch pitfalls early on and overcome them.

Lack of clear goals and success criteria

Clarity is one of the most important requirements for the successful completion of a project and the lack of it creates several project management issues.

It is also important to come up with a way of quantifying project progress by setting up milestones and quality tests. In addition to helping your team progress, having a clear set of objectives will also help project managers present a clear picture to management.

For example, in the event planning example earlier, if you don't have a clear, specific outcome, your marketing activities wouldn't be aligned with management's objectives.

Lack of communication

Effective communication is extremely important for a successful project. You need to have timely and transparent methods of communication to ensure that all stakeholders are involved in the process.

Miscommunication is also dangerous for project teams because it affects their teamwork. It can cause conflicts among team members and can potentially delay the project.

Budgeting issues

The extent of your marketing activities is limited by the spend allocated by management. When your giveaways and ad spend exceed the budget, you'll run into trouble.

That's why it's important to take budget into consideration even before you start brainstorming ideas.

Lack of accountability

As any project nears its close, stress levels shoot sky high. Blame gets thrown around often. I didn't design it because I didn't get the copy. I told the designer to use placeholder content so my copy can fit the predefined size

A project team performs really well when every member feels responsible and tries to fulfill the role assigned to them. Effective project managers properly assign responsibility to the team and direct the team towards the common goal.
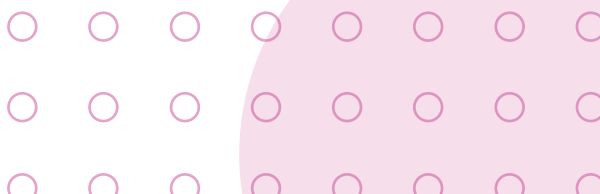
Inadequate risk management

Having the foresight to identify potential "what if" scenarios and creating contingency plans is an important aspect of project management. Projects rarely go exactly as planned because there are so many variables and unlimited possibilities. The project manager needs to come up with alternate plans and contingencies that the team may adopt if the project starts to spiral out of control.

Unrealistic deadlines

Having an impossible deadline can severely affect the quality of the end product as well the morale of the people working on it. You need to know the capability of the project team and negotiate the project timeline accordingly by prioritizing deadlines and project tasks.

In project management, the velocity, which is the measure of work completed in a single sprint, is decided collectively by taking input from all stakeholders.

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Part II

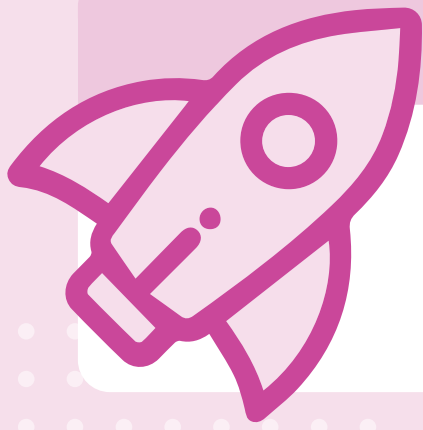So far, we've identified the foundational aspects of a successful project and a dynamic team.

In Part II, we'll study the **lifecycle of a project** from building the idea to closing the project.

Project Initiation: Start Your Project

Initiation

- Define project goals
- Create a business case
- Complete the project charter
- Draw up the list of stakeholders

1

" All projects begin with an idea.

Maybe your boss thinks there's a new opportunity to explore or your client identifies a need and requires a solution. Maybe you think your website could bring in more visitors. The initiation phase is the point where an opportunity or reason for a project is identified and the project is developed to use that opportunity. It's when you turn an abstract idea into a meaningful goal. The team is assembled and a case for undertaking this project is developed during this phase.

The who, what, and why

It's important to set the right expectations at the beginning of the project. Stakeholders have high, oftentimes unrealistic, expectations and resources and timelines are frequently low. You'll need to develop a business case and identify goals and the why of the project. Once you've zeroed in on the goals, KPIs, constraints, and timeline, document them. This document is called the project charter. Well, you know what, you don't have to call it that.

You'll also identify the people who are to be involved in the project. Create a stakeholder register with the roles, designation, communication requirements, and influence.

Developing the business case

The business case is developed during the early stages of a project and describes the what, how, who, and why it's worthwhile to start a project.

It explains how the use of organizational resources, financial and otherwise, would support the business. It's a comprehensive document that explains business concerns, the returns, the key aspects to be measured, and the commitment of deliverables along with the cost but does not delve into technical aspects.

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Here's a sample structure, but it needs to be adapted according to the size and the risks entailed:

- **Executive summary:** A clear, concise summary of the project's definition, reason, and goals
- **Problem statement:** Dive deep into the problem along with relevant research
- **Financial needs:** An estimate of the costs involved and how they will be used
- **A strong recommendation:** Why the project you've chosen is the best solution
- **Potential risks:** Explain the expected risks you're likely to encounter
- **Benefits:** The financial and non-financial benefits the company would get in return
- **Timescale:** An estimate of how long it will take to execute the project
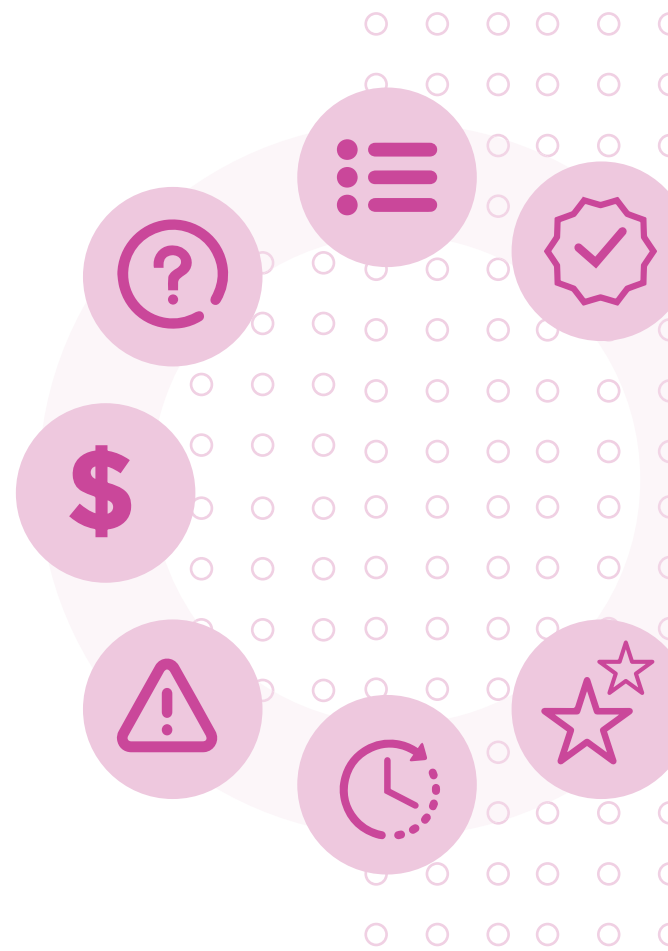
Do a feasibility study

Once the business case is approved, analyze the likelihood of the project being successful. Research the market needs, the potential roadblocks, and other alternative solutions. The feasibility study addresses the:

- Technical capabilities
- Budget
- Legality
- Potential risks
- Organizational needs
- Timeframe

This analysis determines if the project should move forward.

Based on these analyses, decision makers should consider the following questions before giving the green light on the project:

- Could we do it?
- Do we have the resources, budget, and people to do it? Is it technically feasible?
- Should we do it?
- Are the benefits of pursuing this project worth the costs and effort? Is there a better way to do it?

Only if you answer in the affirmative to these questions should you proceed with the project. Going forward despite a resounding "NO" will result in a waste of resources and time and leave your team members frustrated. It's often better to explore other options in such a case.

Create the project charter

The project charter is a document that outlines the purpose and requirements of the project. It includes the business needs, key participants, the scope, objectives, and high-level goals, providing a foundation for defining project decisions and to make sure they're in line with organizational goals. It also lists the roles and responsibilities of the project team and identifies the project's customers and stakeholders.

Here's the structure of the project charter:
- Title
- Brief description
- Background
- Goals/Deliverables
- Scope
- Impact on other business units
- Stakeholders
- Roles and responsibilities
- Milestones
- Budget
- Constraints, assumptions, dependencies, and risks
- Success measurements/ROI
- Project approval

Assemble the team

The people involved in the project are the biggest factor that impacts the success of any project. Come up with job descriptions based on the roles and responsibilities from the project charter. Identify the required skills and the people who'd be a good fit.

Now that you've established what's expected of the team, they'll have a fair idea of how they fit in the project. You can map the individual roles and responsibilities both to the statement of work and the scope document.

It will be helpful to develop a RACI (responsible, accountable, consulted, informed) or DACI (driver, approver, contributor, informed) matrix to assign roles to team members.

Review the initiation phase

- Develop a business case
- Conduct a feasibility study
- Create the project charter
- Assemble your team
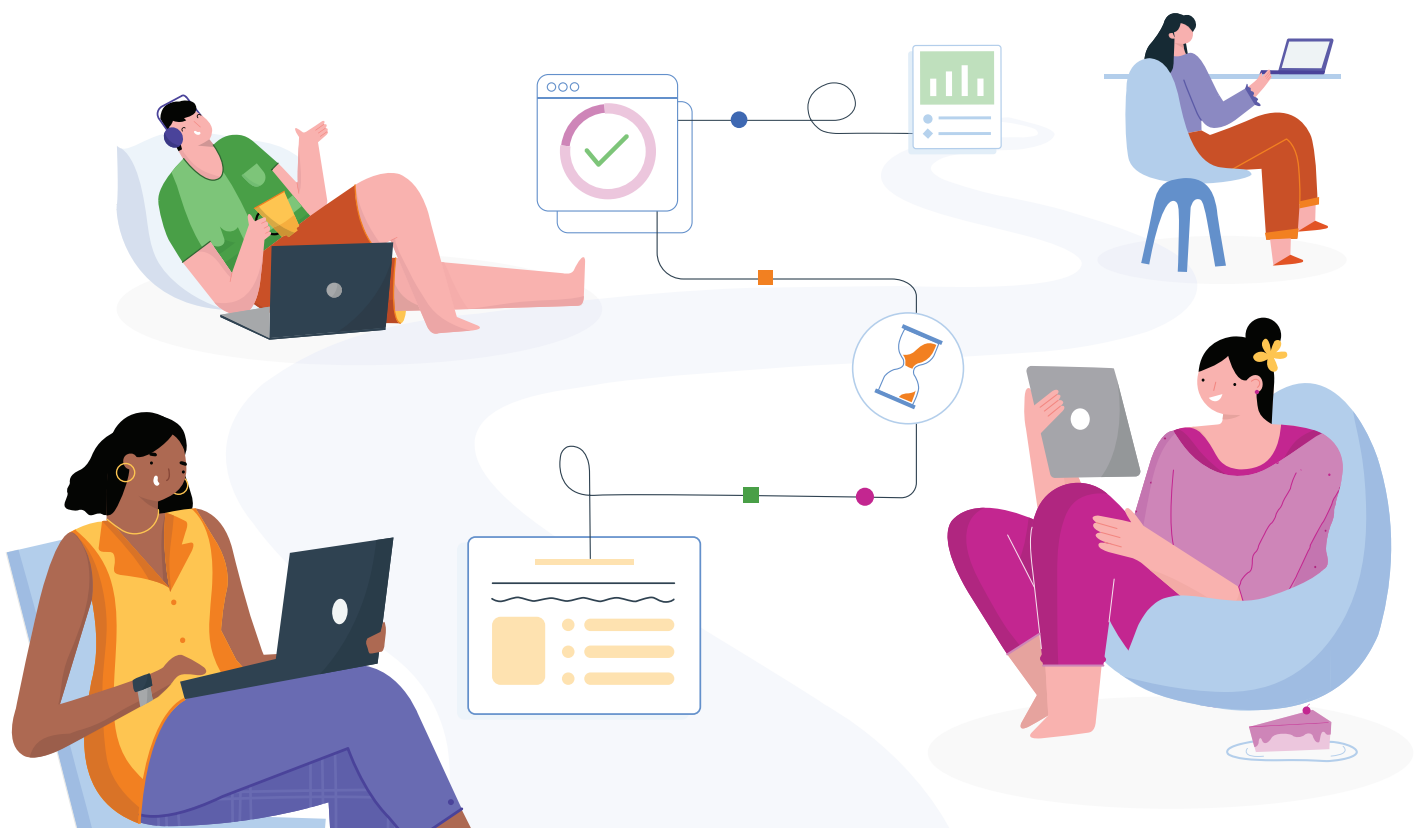
Chapter 6
Project Planning: Organize and Prepare

Planning

- Define scope
- Create a project plan
- Set a budget baseline
- Define roles and responsibilities

2

> ## To achieve great things, two things are needed: a plan and not quite enough time.

It may be tempting to jump straight in and figure other things as you go forward. Maybe it's the pressure to get fast results or it's the misplaced enthusiasm. Without a plan, your team will be directionless, in the best-case scenario.

Every company has finite resources and starting off without a plan puts you in the danger of overrunning those resources and failing to achieve the project's goals.

You need to zoom out, step back, and take a look at the bigger picture. It slows you down a bit in the beginning, but if you know exactly what needs to be done and when it needs to be done, you're setting up your project for success. It gives you clarity and the confidence that you've got all the people, processes, and systems in place to deliver what's required. When people think of planning, their minds immediately jump to scheduling, but wait. You'll be doing other activities before that during the planning phase.

- Share the vision and business requirements
- Establish solid communication channels
- Set measurable goals
- Establish costs, deliverables, and delivery dates

This phase is mostly a lot of talking, getting the views of different stakeholders, thinking, and documenting. A LOT!

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Identify the stakeholders

Anyone who can influence or be influenced by the project and its outcomes is a stakeholder. It includes people who'll be working on the project, the ones who'll contribute resources, external vendors, and the people who will use and benefit from the project's output.

You'll need to meet with the stakeholders and get their inputs with respect to the requirements. Sometimes, this may include clients outside your organization. In fact, you need to get their buy-in before you proceed with the project.

Compile the list of all stakeholders along with their titles, roles, influence, and interest in the project. This document is called the stakeholder management plan.

Establish goals and deliverables

One of the most challenging activities in managing a project is to translate client expectations into achievable goals and deliverables. Yes, they are two different things. The project's goals define the benefits, outcomes, and performance improvements that are expected from the project. Deliverables are the specific, tangible things produced that enable the objectives to be achieved.

For example, increasing website traffic by a factor of five is the goal; running highly targeting ads and five search-optimized blogs a month are the deliverables.

Use the SMART or CLEAR frameworks to set goals that are achievable within the budget and timeline. Goals need to be specific, measurable, achievable, realistic, and time-bound. The project's success depends on if you achieve these goals.

Have a kickoff meeting

Over the course of your project's life cycle, you'll have plenty of meetings with all your stakeholders that discuss statuses, progress, and issues. But the kickoff meeting is significant in its own right because it sets the tone and vision for the project's future and determines the relationships that will unfold in the coming months.

A great kickoff meeting doesn't happen by itself; it requires deliberate planning and is a result of detailed preparation. Ask yourself these questions before you click send on the kickoff meeting invite:

- When is the right time to host the meeting?
- How long should the meeting be?
- Who should attend?
- What should be discussed?
- Where should it be held?
- What documents should you print?
- Do you bring coffee or donuts, or both?

An effective kickoff meeting introduces the stakeholders and the team, provides the background and purpose of the project, the different roles, and gets the input and opinions from all attendees.
The kickoff meeting helps you establish expectations and gather requirements before starting a project. There are no budgetary issues and change orders, well, at least for now. A well-executed kickoff meeting keeps everyone informed, motivated, and focused.

Define the scope

This is also a great time to clearly define the scope, that is, the extent to which your product's features and functionalities must go. It's important to explicitly state this, as comprehensively as possible, to save future misalignments about whether you've met expectations.

The project scope statement details all the boundaries of the project while also establishing the responsibilities of the team. It defines all the procedures that need to be followed for verifying and approving finished work.

The scope statement documentation gives team members a definitive guideline for making project-related decisions.

Outline tasks and dependencies

Once you have a clear understanding of the project's objectives, you need to break down the big picture into individual goals and tasks. You'll outline the major milestones and the deliverables required to reach every milestone. It's important to prioritize tasks based on their importance and urgency. You can use a tool like the Eisenhower Matrix to help you with prioritization. Sometimes, it's better to use a modified version of it with effort and impact as the axes.

Once you have the ordered list of tasks, you need to sequence the activities and establish dependencies. Some tasks may depend on the completion of others. Imagine you're building a house. You need to put the walls up before you can paint them. Painting the walls is dependent on the walls being built.

Quick Wins | Major Projects

Fill Ins | Thankless Tasks

Impact: High / Low
Effort: Low / High
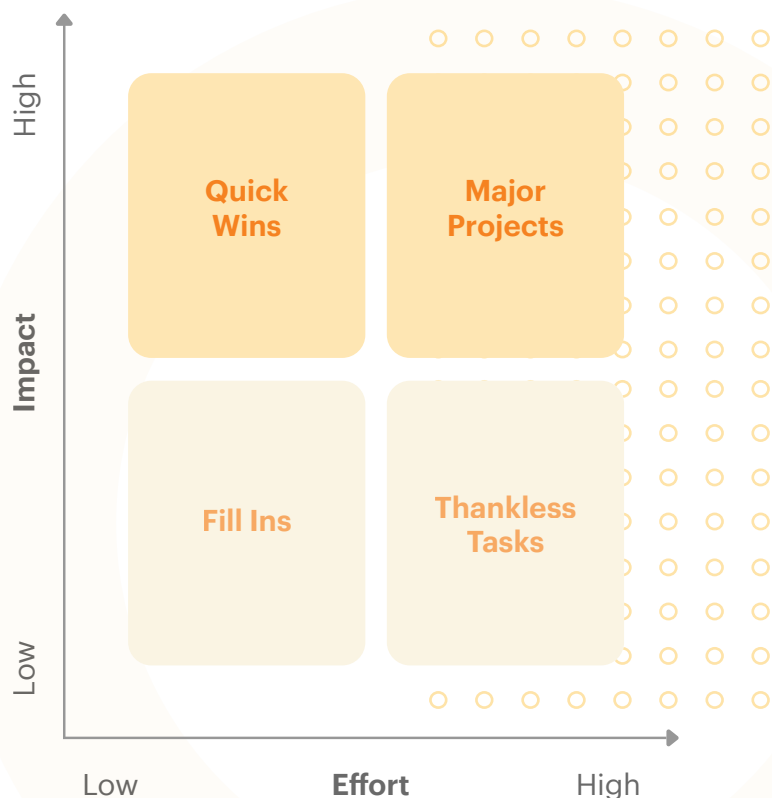
Create a project schedule

The project schedule lays all the tasks outlined in the previous stage on a timeline. It includes the planned start and finish date, duration, and resources assigned to each activity.
For each task determine the following:

- The amount of time required to complete the task
- Who will carry out the task?

You'll start by dividing your team's available hours across all activities and make sure these estimates line up with your project's duration.

How long will each activity take?

There's no definitive answer to this question. The best way to estimate duration is to use data from similar previous jobs. If you don't have any data to work from and there's no industry standard to which you can refer, use an estimate based on the average of the best, worst, and most likely scenarios.

One way to create a realistic schedule is to work backward from the project's proposed end date or other deadlines that cannot be changed. This helps you determine when your deliverables must be ready. You can use tools like Gantt charts, timelines, or even calendars to help you create the project schedule.
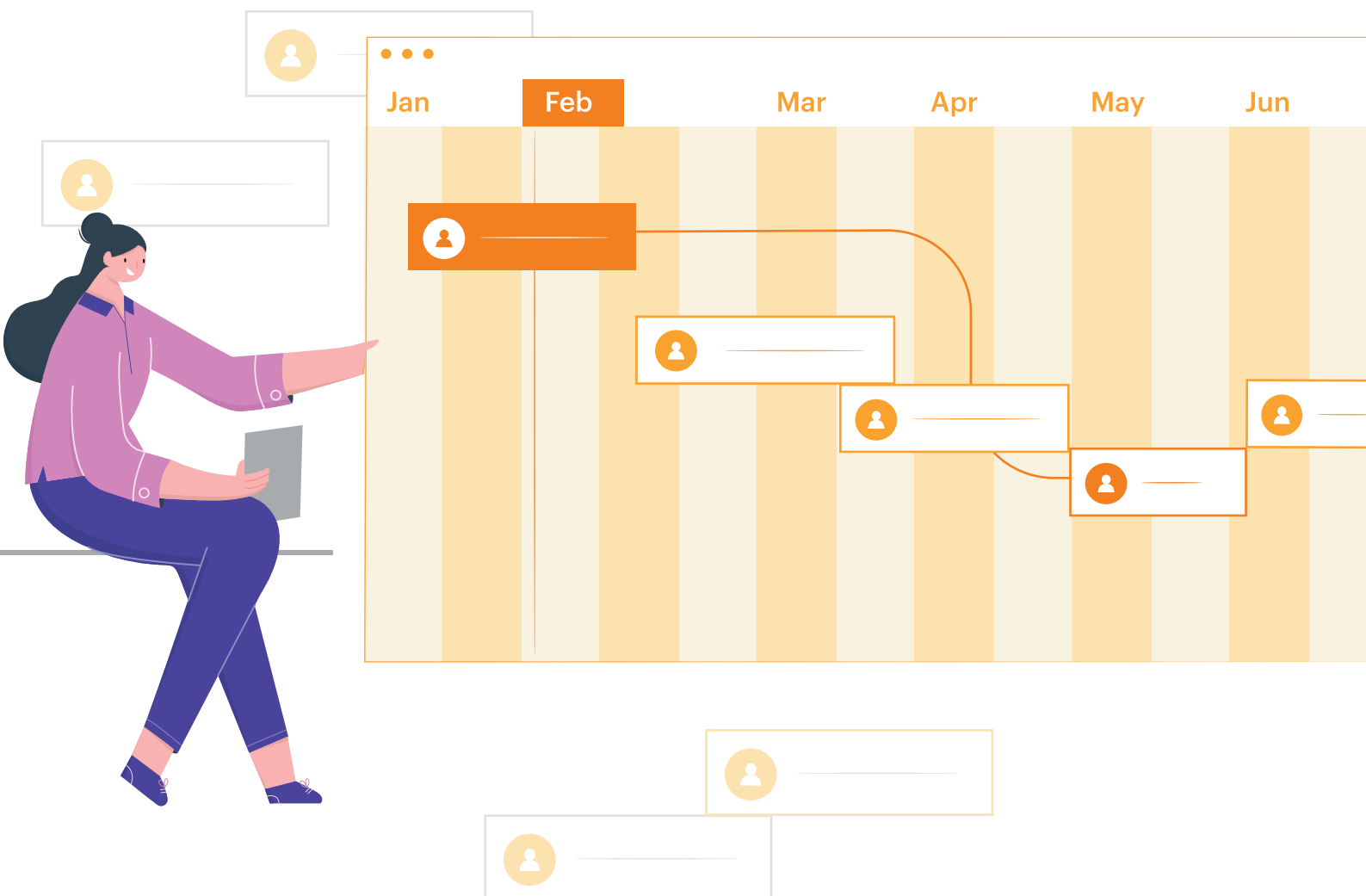
Assess the risks

A risk is a problem that may or may not arise over the course of your project. It's important to identify risks and mitigate them at the project planning phase rather than be caught off-guard later. Hold a meeting or ask for insight from all team members about the risks you should consider.

Areas of risk include:
- Optimistic timelines
- Unexpected budget cuts
- Market fluctuations
- Poor communication
- Technical failures
- Legal issues
- Acts of God, extreme weather, pandemics

There's no way to prepare for all potential risks, but thinking through them ahead of time can save your project from failure. Create contingency plans and compile all of these along with their descriptions, likelihood, severity, and mitigating actions.

Develop the project plan

We said there will be a lot of documentation during this phase, didn't we?

You'll have the following documents by now:
- Stakeholder management document
- Roles and responsibilities of team members
- Objective statement
- Communication plans
- Scope statement
- Project schedule
- Risk assessment

In addition to these, you'll also create the policies and guidelines that govern change management, communication systems, and decision making. Compile all these into a document, and that's called the project plan. Ta-da!

What to do when you don't have all the answers

It's likely that you'll be having all the information in the beginning. Make assumptions in such cases. Assume you have the required funding, resources, and people. Add these to the project plan along with the time and financial constraints.
The project plan is not set in stone; it's malleable. The project plan acts as the guide, to give you direction to complete the project. It's rarely restrictive.

Every now and then, you should come back to it, see if it's working according to your plan, and make changes if it doesn't. Things like project schedules rarely go according to plan and you'll have to adapt it as you go.

Get your plan approved

Once you've created the project plan, you need to get it signed off by all stakeholders, especially external clients and management. If management releases some team members during the course of the project, you're justified to change the timeline. After all, you planned the schedule based on the assumption that you'd have the required people for the project, which management agreed to.

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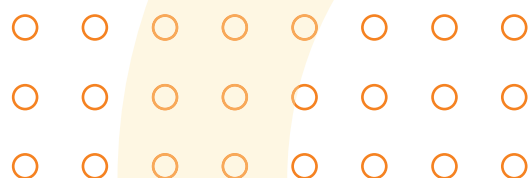
Chapter 7

Project Execution: Carry Out the Work and

Project Monitoring: Track Your Progress

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Execution

- Allocate project resources
- Manage project resources
- Build the product or process
- Meet often and fix issues as they rise

3

You've done the difficult "figuring out" part; you know what needs to be done, who's going to do it, and when it needs to be done. You now have the predefined steps that will help your team actualize your plans.

The execution phase is usually the longest phase in the project's life cycle; and the most demanding. Your team carries out all the planned activities during this stage, constructs the deliverables, and presents them to the stakeholders. Your focus, as project manager, will change to performing and supervising all activities to create the deliverables as outlined in the project plan.

As long as your team works effectively and adheres to the plan, you'll be on track to successful project completion. As long as...

There might be hiccups along the way, but if you catch them early on, it will be easy to course-correct. You'll need to continuously track the project's progress and ensure that the milestones and deliverables stick to the project schedule. For this reason, the execution stage always happens in concurrence with the next phase—project controlling and monitoring.

The majority of the activities during this phase will be handled by your team. You need to step back a bit and let your team carry out the plan. It's a fine line to tread because you need to give your team enough autonomy while taking care that everything goes according to plan.
You need to play the role of a conductor in an orchestra.

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Delegate tasks to get work done effectively

Eli Broad, builder of multiple fortune 500 companies says: "The inability to delegate is one of the biggest problems I see with managers at all levels".

Delegation does not mean that you let go of every aspect of the project and start depending on team members. Instead, <u>it means that you empower your team and build their confidence by making them responsible for a small part of the project</u>. It can be a repetitive task or something you feel a particular member is better at.

Empower your team to make decisions

You must have had tasks where you felt that your hands were tied because you couldn't make any decisions. Avoid making your team feel that. Give them enough authority to make decisions and take the necessary steps to fulfill the plan. An empowering environment is a sufficient motivator for team members that encourages them to go above and beyond.

Be open to new ideas

As the project manager, you'll have the final say in the direction of the project. It is, however, a good practice to involve the team in making some decisions. Even if they suggest a different approach than what you had in mind, appreciate their input and be flexible enough to accept better suggestions. This will serve as a good motivator and make the team feel valued and their contributions acknowledged.

Manage the communication

It's the responsibility of the project manager to consistently maintain effective collaboration between the project team and the stakeholders. You need to share the project's progress to all stakeholders throughout this phase frequently.

Your communication management plan (from the planning phase) would have outlined when each status review meeting is supposed to take place. Ensure they take place on time and have the right people in them. This ensures that everyone stays on the same page and the project runs smoothly without any issues.

Schedule periodic meetings with the project team to review the current status of the project. Discuss the next steps in the project, obstacles, and how to solve these problems during these meetings.

Measure progress regularly

There's no way to know if you're staying on track if you aren't measuring the project's progress.

Your project planning process included setting measurable goals and KPIs (key performance indicators). This is where all the effort you put into documentation comes in handy.

Collect data on those KPIs and compare reports with the baseline metrics on a regular schedule to ensure you're on track. You can use tools to email you weekly reports or be alerted when deadlines approach or when they're missed.

During the execution phase, risks may materialize. By continuously assessing risks, you equip your team with contingency plans and keep the project from failure. If at all anything changes, and trust us it will, update the documentation. Keeping the project plan up to date is the project manager's responsibility. Like we said earlier, it's not set in stone.

Include cost expenditure and quality benchmark updates to the project plan. If some process, guideline, or policy seems to be defunct, remove it.

What to do when someone misses a deadline

Suppose a team member comes to the weekly status review meeting and says he or she could not keep their promise for the week. Do you let it slide? Do you reprimand them?

In addition to delivering a successful project, it's also your responsibility to be a good leader. You need to build a great team that holds itself accountable and delivers on its commitments. When someone misses a commitment, try to find what got in the way.
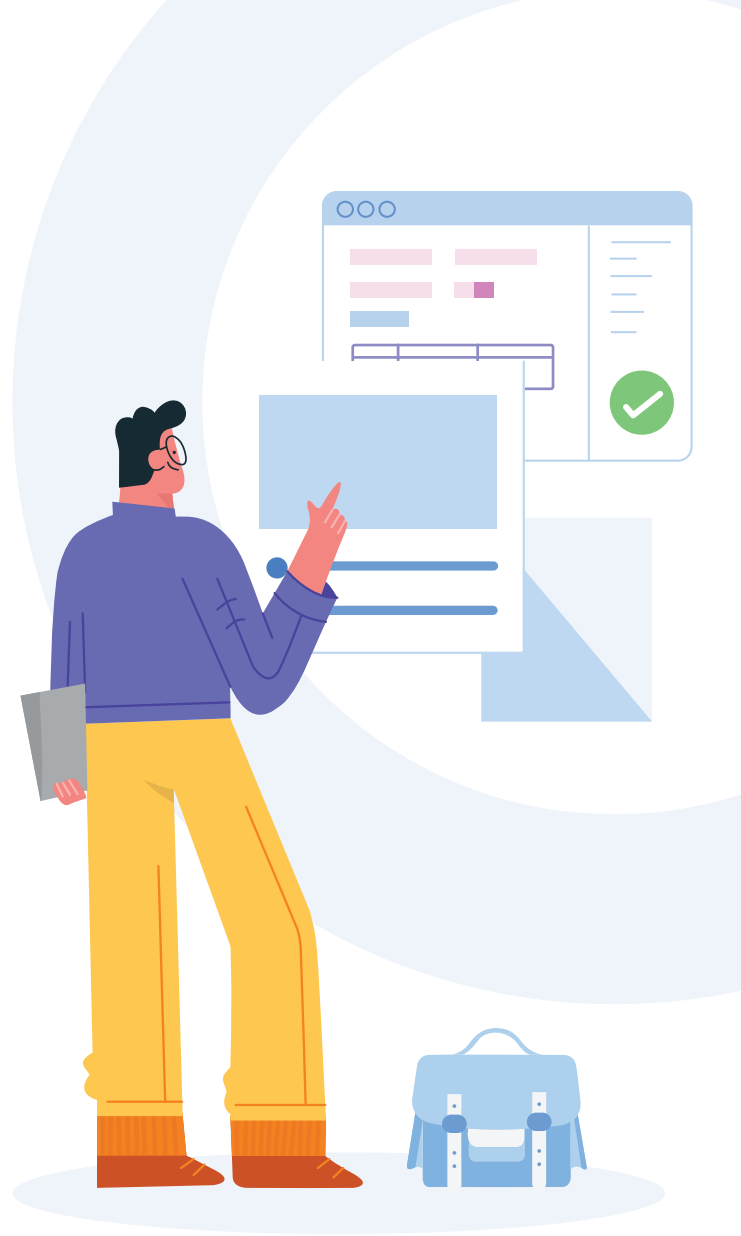
Listen first: Let them explain their side of the story; what made them miss the commitment? Was it a personal thing or a professional conflict?

Practice accountability: It's important for everyone to understand that the team functions on everyone's contributions. Hold them accountable for their missed commitments while demonstrating respect. No one likes to feel ashamed. Be empathetic with them and show respect.

Reset expectations: Explain why their commitment is integral to the project's success and set a new deadline for completion.

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Control the scope

Almost every project suffers from a nasty monster called Scope Creep. It is when the project slowly grows out of your control and beyond the project's original scope. The client wants a new color palette. You oblige since it wouldn't take your team too long to do it. They want a mobile version and you begrudgingly say yes. Before you know it, the plan changes so much that you have incurred significant additional costs and won't be able to complete the project on time.

Scope creep can happen because of a lot of reasons:
- One of your overzealous team members wants to showcase their abilities.
- The upper management goes beyond the scope to impress the clients.
- The clients have changed their expectations.

Now, you cannot and should not avoid all change requests. Most projects require you to iterate and adapt to change. Market conditions, client needs, and organizational priorities can change and you need to deal with them.

Try to answer the following questions:
- What's the intent of the change?
- What's the impact of the change?
- What needs to be done to make the change happen?

What will happen if the change is not made? The change in scope can push back timelines and that needs to be documented in the project scope document.

What to do when the schedule changes

Schedule changes happen more often than you think. In fact, two out of three projects do not get completed on time. With so many diverse factors influencing your project, there's little chance that your project sticks to the exact schedule.

It's important to get on top of missed deadlines as soon as possible. The weekly meetings will help you find out information about "late work". Again, proper communication is key here. It takes a lot of trust for a team member to tell you that they won't be able to deliver on time. If you have this camaraderie and transparency built in your team, it will give you enough time to add spare resources.

Here's what you need to do when the schedule changes:
- Update the project schedule document.
- Check your prioritized task list to see if you can compensate for the lost time by cutting down on other tasks.
- Find other team members to ensure that the final deadline is met.
- Talk to management and the clients, be transparent about the situation, and get an updated timeline.
- If you have the budget for it, get outside help.

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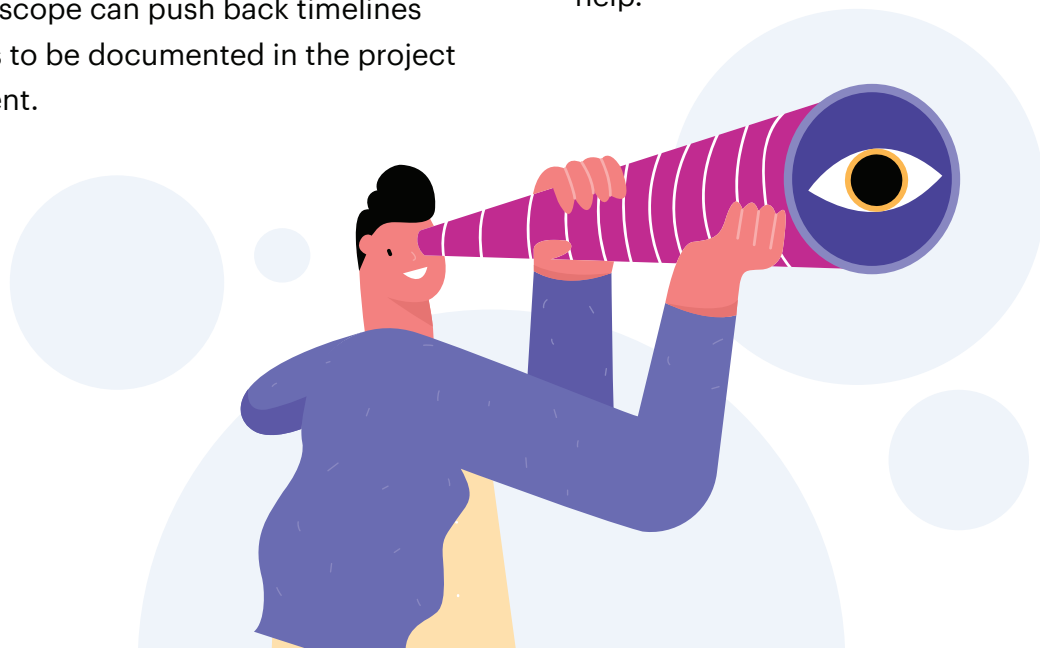
Ensure quality of the output

Quick question:

What does the execution phase produce?
Deliverables, you say! Correct.
You know what else this stage produces?
Defects.

No matter how flawless your team is, there isn't a project that's devoid of defects. It's always a good practice to make sure that you've translated the client's expectations into the deliverable. Test these deliverables and see if they meet the acceptance criteria

Review all deliverables

Once you have the deliverables ready, you'd schedule a formal phase review with all key stakeholders. All deliverables are reviewed, accepted, and approved. If there are any passable issues, they are documented along with their resolution plan and all relevant plans and documents are updated accordingly. Once you have the greenlight from the stakeholders, you officially proceed to the next phase - project closing.

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Chapter 7

Project Closing: End All Activities

Completion

- Handover deliverables
- Review project deliverables
- Get project results approved
- Document project learnings

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You and your team have gotten the deliverables approved and all the items in your project plan have been checked off. The team is jubilant and excited about the end-of-project party. You might want to hold on to that bottle of champagne. We have one last thing to do–properly close the project.

It may look like you only need the first four phases to tie up the project and call it a day. After all, the project is technically complete. But, there is a lot of unsexy work like approvals, signatures, payments, and paperwork that makes the project closing phase equally important. It helps you transition your project to the client smoothly and helps you not repeat the same mistakes again.

The project closing phase is a process in itself. You need to get the sign-offs on deliverables, disband the team, close out contracts, and archive the documentation for future reference.

How do you know when the project is done?

Is it when your task list has all items checked off? Or, the little progress bar in your project management software is a glowing green that screams "100% complete"? Is it when the clients or the end customers have started using the outcome of your project? Or, is it when your management assigns you another project?

The short answer is it could be any of these and how you define "done". The long answer is a bit more complex than that. Knowing when we're actually done with the project depends on the project, the customer, and the agreed upon completion criteria set during the planning phase.

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Transfer all deliverables

It's time to go back to the scope document and see if everything that the project promised to accomplish has been delivered. It's sometimes the case that deliverables are transferred over the course of the project or when milestones are reached. During the project's closure, make sure that you've delivered everything that's been previously agreed upon.

Hand the deliverables created during the execution phase along with the necessary documentation and other agreed-upon services like demo and training. Ensure that the client is satisfied with the finished project.

Complete the contracts

Once you've handed off all the deliverables, the stakeholders need to sign off on the completion of the contracts. Everyone approves of the results and agrees that the deliverables meet their requirements. The invoices are paid, the objectives have been met, and everyone agrees that the contract has been fulfilled. A project cannot be completed unless this step has been carried out.

Have a retrospective meeting

The most important reason for closing the project is to formalize the learnings. Hold a reflection meeting after the completion of the project in order to contemplate on the successes and failures during the project. You'd have generated a wealth of information over the course of the project. There would have been so many lessons learned along the way, irrespective of the outcome of the project. This retrospective learning sets you up for future project success.

Revisit each project phase and determine how work progressed, the mistakes made, and the things that were done right. In fact, being a successful project manager is doing more of what went right and less of what went wrong. Ask yourself and your team the following questions in addition to the above discussions:

- Did we do a good job of anticipating and mitigating risk?
- Are there ideas to improve the existing process?
- Was there something you'd have done differently?
- Were there any compromises along the way?

Disband the team

Now that every team member has done their part, it's time to release them to other projects. Now, this may not always be the case. There are fixed-team projects where teams are not disbanded and they just move on to the next project.

Notify the external vendors and contractors about the completion of the project. It's also time to review pending payments and complete the procurement closure.

How do you deem a project successful?

It's not easy to say if a project has been successful or not. It's a matter of how you define success or rather how your clients define success. Here are the questions you need to answer:

- Did we meet the goals and objectives?
- Are the clients happy with the outcome?
- Is management happy with the outcome?
- Did we deliver the project on time and within the budget?
- Was it worth the time, effort, and cost?
- Quite often, a project's success is measured only by budget and time. There are countless examples of projects that exceeded their budget and schedules and yet are considered successful.

For example, Denver airport ended up costing twice its budget and only received half the expected traffic in the first year. Was it a failure? Maybe. Maybe not.

At times, some aspects of a project may fail and still produce good results in the longer run. A rule of thumb to determine success is to check if the desired quality was achieved and business results were satisfactory.
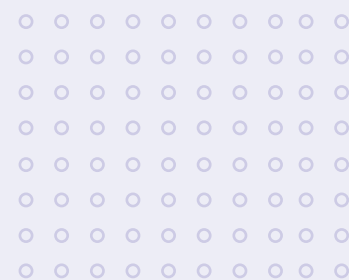
Document all learnings

The retrospective meeting would have helped you summarize the learnings from the project. But, you'd have generated a trove of documentation, starting from the initiation phase. Note down the highlights in a readily accessible file and archive the official documentation. Make sure that it's easily searchable with proper naming conventions.

If there are similar projects in the future, you can use this file to estimate time, costs, and other resources.

Celebrate success with your team

Celebrating success is an extremely important aspect of the closing phase. Show your appreciation to the folks that were committed to the success of the project. Thank people personally. It goes a long way. Highlight the lessons you learned along the way and show them that you're interested in working with the team again on a different project.

Now, pop that bottle of champagne and revel in the success of your project!

Now you know how to manage a project from start to finish and how to steer it to success. All you need is the right tool to help you plan, execute, and monitor your projects. This is where cloud project management software like **Kissflow Project** will come in handy.

This intuitive tool makes it simple to handle your projects even if you aren't project trained or certified.

In a nutshell, it's the best project management software for people who want to get work done and not be distracted by the tool.

It also helps that Kissflow Project comes loaded with customizable templates for a variety of projects and functions.

Ready to take your projects to the next level?

Sign up for free today!

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