Project Management
Best Practices

Prepared from Method123.com Newsletters

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The Benefits of Using a PM Methodology

If you are currently using a project management methodology or considering implementing one in your company, consider the following four benefits of having such a roadmap to follow.

Reason 1: It Increases the Chances of Project Success

Failure always lurks on the fringes when something new is tried. That's what makes being a project manager so exciting. Your job is to keep failure at bay and prevent it from negatively impacting your projects. But, there are enough variables that could cause problems for your project that the methodology that you use should never be one of them. In fact, having a project management methodology in place will absolutely increase the chances of your project succeeding.

Why is this? Because a methodology is a tried and true way of getting your projects done. Following a certain methodology ensures that all the necessary steps are taken, no shortcuts are introduced, and the work is done to the highest standard that the company can perform. Following such a well-thought out road map is certain to increase the chances of your project making it successfully to completion.

Reason 2: It Increases the Amount of Time Available to Spend on Work

What happens at times in companies is that multiple methodologies may be introduced across different groups. This is a natural evolution that occurs as departments grow and projects need to be complete. One department may adopt a waterfall methodology where one phase of the project needs to be 100% complete before moving into the next phase of the project. Other departments may adopt a more agile form of project management where the understanding is that the requirements and needs of the customer will unfold along the way and become clearer as the project progresses.

Each methodology may work just fine for each department. But, there will always be the need for resources to be shared amongst departments. This may introduce confusion when a resource has to switch from one PM methodology to the next and they need to be trained on their new methodology. Having one clear, consistent project management methodology in place throughout the entire company will reduce the need for training people in different methodologies and increase the time that they can spend doing the actual work.

Reason 3: It Eliminates Choices Where None are Required

There's an interesting phenomenon that occurs when decisions need to be made on a project. There is usually less input given into large, complicated decisions than there is for decisions that are routine and simple. Why does this occur? Because most people aren't necessarily familiar with the subject and background surrounding the large, complicated decisions but they are familiar with the context of the smaller and more routine decisions. This causes everyone to want to chime in and give their two cents worth to the discussion about the smaller decisions.

A project management methodology eliminates this phenomenon from occurring. All the small decisions that needed to have been made have been made ahead of time. The results of these decisions have been included in the methodology and become part of the roadmap for everyone to follow. This allows teams to educate themselves on the bigger decisions and issues and provide input in those areas that really matter.

Reason 4: It Allows for Consistent Reporting and Analysis

When you look in the dictionary there are usually 2 or 3 definitions for the same word. There's nothing wrong with that because it's the context of the conversation that aids in the final understanding of the proper definition. Reporting and Analysis on project progress and results do not have the same luxury. The terminology that is used in these reports must be consistent across the board or confusion will result.

Here's a great example that most project managers are well too familiar with... What is the definition of "done?" If you ask a developer, "done" is defined as he has finished his part of the coding and is moving on to his next task. This is regardless of whether it has been tested or not and may have to be sent back to the developer for more rework. On the other hand, a client's definition of "done" may be that the software he has paid for has been up and running in his company for 3 months and all the bugs have been ironed out.

A project management methodology will introduce just one definition for the word "done"...and other words for that matter which allows for consistent, meaningful, and actionable reports across the organization.

Project Management for Dummies

You can manage any type of project, by taking these 5 steps:

Step 1: *Set the goals*

The 1st step is to gather your team together on site and set the goals. This means stating clearly what they have to achieve, by when and how they are going to do it. At this meeting, you need everyone on board, offering you their full support. Get them pumped and ready for action!

Ask your customer to come to the meeting and explain why the solution that the project will deliver is critical to their business. Get your customer to explain why the timescales are also important and the level of quality that must be achieved. Only with an understanding of the solution, timescale and quality targets will the team fully realize what it is that they have to achieve and be motivated by it.

Tip 2: *Plan, plan, plan*

The next step is to plan a course of action to achieve your goals. Work with your entire team to identify all of the major tasks that need to be completed. Estimate how long each task will take and create your project schedule. Then assign resource to each task so that everyone in the team knows what has to be done and by when.

Run the plan past your customer to get their feedback. Only with a rock solid plan will the team have clear direction going forward.

Tip 3: *Measure, Monitor and Control*

Then start measuring progress against your plan and monitoring it weekly to ensure you're always on track.

You also need to control any change requests. This is when someone requests changes to your scope or deliverables. They might be a great idea at the time, but unless they are going to save you time or money, then wherever possible try and park them and move on. Changes to project scope often kill the best laid plans.

Tip 4: *Communicate clearly*

You know whether you're ahead, on track or behind - but do your team? You need to keep them and your customer properly informed, if you want their full buy-in and motivation.

Also, report your project status to your customer weekly. Hold regular project status meetings with your team to keep them informed of progress against the goalposts and what lies ahead.

Tip 5: *Work Smart*

You have limited time and resources to deliver your project, so you need to work smart. Manage your time carefully. Use "To Do Lists" to priorities your work. Limit the number of meetings you have and keep telephone calls short. Only work on prioritized tasks. If something arises those is non-critical then keep a record of it and move on.

How to Scope Your Projects

Someone just came up with a great idea for a new project! It's going to do this, and save that, and eliminate the need for something else. The list goes on and on of how great this project is going to be and all the wonderful things it will accomplish. But, it's hard for you to get your head around a clear understanding of this project, let alone be able to explain it to someone else.

Take heart. There is a relatively simple process to follow that will allow you to take a huge list of features, requests, and requirements and turn them into something manageable. Take these steps to scope your projects:

Step 1: Set the Direction of the Project

At this point, you should have already met with the initial stakeholders and sponsors of the project for a high level understanding of what this project needs to accomplish. Take this general understanding and break it down into more of a vision of where this project is going and what objectives need to be met. This will allow you to frame the conversation you will have with the expanded set of stakeholders in step 2.

Step 2: Conduct Workshops

Once you have a clear direction established for where the project is going, you will now conduct workshops to identify what elements will make up the scope of the project. Include all important stakeholders to help assist in this identification exercise. Who would be considered important? Anyone that has a vested interest in the success of the project. This can range from the executive project sponsor to the end user of the finished product. Get everyone around a projector and take notes where all can see. Or, use the large sheets of paper with the adhesive backs and spread them all throughout the room. Ask what everyone feels will be necessary to include in the scope of the project in order to meet it's objectives. One more question to ask during these workshops is what will specifically be "out of scope". Calling these out from the beginning reduces many misunderstandings later in the project.

Step 3: Prioritize the Deliverables

You will end up with a list of deliverables that is larger than life. Everyone will want their opinion to be heard and provide their input into what should be included in the project. That's great! That's exactly what you need to have happen. Now, you need to narrow these deliverables down into something that is achievable. One of the easiest ways to do this is rank the deliverables with a 1,2, or 3. A '1' is a must have, a '2' is a nice to have, and a '3' is something not that important at all. This will allow you to concentrate and spend time on only those deliverables that will really make the most impact toward the project reaching it's stated objectives.

Step 4: Dig Into the Details

You will now have a finite and shorter list of deliverables to focus on. Dig into the details of this shorter list and ask some hard questions. Will these deliverables really make the impact that they are intended to accomplish? Should a deliverable be expanded further? Is there a way to consolidate multiple deliverables into one in order to save time and effort. This further refining process will help reduce the scope even further which results in some very well-thought out and solid deliverables.

Step 5: Determine Feasibility

From this shorter list of deliverables you now ask the question of how many of these are even possible. There may be something on the prioritized list that is a necessity, makes perfect sense, but also costs a million dollars. This is something that your company may not be able to afford at this particular time. You can then remove this from the list and look for further alternatives.

Step 6: Compile the Final List

You should be feeling pretty good about the scope of your project at this point. The direction is clear, you've received loads of input, and you have a list of deliverables that are well thought out and feasible. Compile this final list of deliverables with a brief description of each one and which priority they have been assigned. You now have the basis for a solid scope of work that you can present to upper management or the client.

Step 7: Obtain Sign-Off

The final step is to obtain written sign-off on the scope of the project. There is a lot of work that is about to be undertaken at this point of the project and this approval will give you the confidence to move forward.

The Essential Steps to Managing Projects

There is so much to learn to become a great project manager. You have to juggle time, money, people, equipment and materials. To do it all, some people feel like they have to be a miracle worker! But it's not the case. Just take these essential steps...

Initiate Carefully

When you start your project, wind it up slowly. Define the process by which you're going to manage your project from start to finish. Adopt a Project Life Cycle so you know what you have to do and by when. Then take these steps:

1. Define the project goals, timeline and schedule
2. Quantify the amount of resource you need
3. Specify the project scope and deliverables
4. Decide if you need to outsource to a supplier
5. Recruit your team and set up a project office

Plan In Depth

Then identify all of the tasks needed to complete your project. Prioritize them and calculate how long each will take. Create a detailed project schedule, so you know what you have to do, when and how. Then take these steps:

6. Identify the number of resources you need
7. Set a budget and plan your expenditure
8. List the deliverables and set quality targets
9. Plan your communications so everyone is informed
10. Decide how you are going to manage risks, changes and issues

Execute Swiftly

The next step is to execute your plan quickly and efficiently. This is the longest phase in the project, so you need to work smart to complete this phase on time. Take these steps:

11. Record time spent by your team completing tasks
12. Frequently check your actual vs. planned progress
13. If you start falling behind, take action or get help
14. Resolve risks, issues and changes quickly
15. Keep your team motivated by rewarding good performance

Close and learn

When you've produced all of your deliverables and handed them over to your sponsor or customer, you're ready for closure. Do this by releasing project staff, contractors, suppliers and equipment. Then close your project office and handover documentation. Take the time to identify your lessons learned, as these will be invaluable to your next project.

The 5 Skills You Need as a Project Manager

Managing a project is a challenging task. But if you can master these 5 skills, then you're well on your way to project success...

1: Planning
Every Project Manager has to become a great planner. You need to plan your project, the tasks entailed, resources, equipment and materials needed. Create a bullet proof Project Plan at the start of each project and measure progress daily.
You also need to plan your team's tasks for the week and check that those tasks are being completed every day. You job is simple-you feed your team with work from your plan, and you track and measure progress. That's what being a Project Manager is all about.

2. Prioritization
You are the one person on your project who needs to be an expert in prioritization. Every day, your team will struggle to manage priorities because there will always be too much to do. Your job is to give them crystal clear priorities every week, to help them manage their day. It keeps stress levels low and helps them work efficiently. Without clear priorities, your project will be like a ship without a rudder. Coasting along inefficiently, without a precise direction in mind.

3. Delegation
You can't do everything. You might be capable, but there won't be enough hours in the day. So you need to become a great delegator. If tasks arise that others can do, then delegate them. Your job is to keep the ship on its course, not man the engines.
Delegate even the smallest of items, as they still require attention and focus. Delegate even when you could do something better or faster than your team. The only time not to delegate is when there's no-one to delegate to. Even then, see if you can get budget to hire another person to help you out. Remember-you can't do it all.

4. Leadership
Great Project Managers are great leaders. They set the course, lead the team in the direction required, they motivate team members individually and look after their welfare.

Great leaders know what it is that motivates their people. They put them in roles they enjoy and are naturally talented at. They listen and they genuinely care. To inspire your team to achieve success, you need to become a great leader.

5. Communication
As a team member, you need to know what has to be done, how and by when. That's where the Project Manager's communication skills come into play. You have to constantly communicate the goals, timeframes and set expectations to your team.

Then communicate feedback as progress happens. Tell people directly where they are going right and where they need to improve. Communicate clearly and concisely. Follow up in writing when it's important, so you don't have to remember everything said.

So that's it. If you can plan, prioritize and delegate your work as well as communicate and lead, then you will become a top notch Project Manager.

The 5 Things you Must Do as a Project Manager

It's a tough job, managing projects. But if you can do these five things really well, then you're likely to achieve project success...

1. Set the Roadmap
Every Project Manager has to set a clear roadmap for the team. This includes a crystal clear project plan, goals, timeframes and deliverables for the team.
Start by getting your boss to agree on the Project Goals and Timeframes. Then run workshops with your team to plan the road ahead. This gets their buy-in to the timeframes and deliverables at a detailed level. Then present your project plan to your boss or the customer to get it approved. By creating a clear roadmap ahead early on in the project, you'll make sure that you kick-off the project on the right foot.

2. Time-box Everything!
You project plan will describe the general timeframes for the project, but you need to make sure that within this plan, every individual task has a clearly defined start and end date. Then make sure that resources are assigned to tasks and they know what must be complete and when.

Absolutely everything in the project must be time-boxed, and not just tasks. If you run meetings, then set dates for when you expect the minutes to be written up by. If you run workshops, make sure that the actions that were generated have due dates. Anything that isn't time-boxed becomes an "operational task" and you have no way of knowing if it's on time or not.

3. Blow the whistle regularly
As a Project Manager, you need to actually check that everything you delegate is completed on time - otherwise you need to *blow the whistle at them!* You can't simply trust that people will get work done on time and move on to other things. You need to list everything you've asked to be done, who's going to do it and by when - and then check that it's competed. That way, you can ensure you proceed according to plan.

Also, don't be afraid to be the "busybody" who is "always poking their nose into work that others are doing". In fact, that's actually your job! Find out who is working on what, where they are at and how long it's going to take to finish and compare that to what you expected in the first place. Do this every day, for every member of your team. Remember - you need to *control* the work, not just *monitor* it.

4. Be Strong, but Supportive
As the Project Manager, it's *your butt* that's in the firing range! So don't be afraid to be strong with your team. It's a tough balance to strike (being strong vs. supportive), but all great leaders have found the balance and achieved the right results.

If you need to have a terse word with staff, then do it personally rather than in front of the team. Speak openly and honestly, never "fluff it up". Tell them straight, but always be professional and constructive. They will respect you for it. One great tip is always to start with a positive and end with a positive, to ensure you get their buy-in.

5. Review
Your job is to lead, coach, manage and *review*. So keep a close eye on progress and where things are at. Use tools to see if you're on track daily and take action if you're not. Review *everything* - time, deliverables, quality, budget, suppliers etc . You're the watchdog, who makes sure that it's all done according to plan. But remember—the watchdog is always the first in the office, the last to leave and buys the morning tea to keep the team motivated!

So that's it. If you can set the roadmap for your team, time-box everything, monitor and review progress, while finding the balance between being strong and supportive, then you'll achieve success and be a great leader in the process.

The Role of a Project Manager

The role of a Project Manager is to "Deliver the project on time, within budget and to specification". So in other words, you need to specify clearly upfront what must be delivered by the project, and then you need to produce it within the schedule and budget assigned.

But it's not that simple. You might meet this objective but totally fail as a "top notch Project Manager". We believe your role is much more than that. It is also...

1: To recruit the best

Great projects are delivered by a great team. Your role is to recruit the best people you can find and make sure that their skill sets are perfectly complimentary so that you have all of the experience you need to deliver the project successfully.

You need to document a detailed Job Description for every person in your team so that they all know what is expected of them, at every step in the journey. Only with a great team and everyone knowing what is expected of them, will you deliver a great result.

2: To motivate and lead

You need to be the one "cracking the whip" so that everyone knows what is to be done and by when. You need to be strict and make sure that every task is done on time and doesn't slip. If it does slip, then you need to identify the slippage immediately and have contingency plans so you can get back on track.

As well as cracking the whip, you need to be positive and supportive towards your team so they know you also care. You need to lead by example and motivate others to do the same. If you want others to work hard, then you need to work harder than they do.

Lead by giving them direction, motivating them to work hard and showing you care along the way.

3: To manage the finances

Every project has a budget, whether it's clearly defined or not. You need to ensure that you don't spend more than you're entitled to, or your sponsor / client will be dissatisfied with the end result. Manage finances carefully by listing every expense and ensuring that they are budgeted upfront. If unbudgeted expenditure takes place, tell your client as soon as possible to avoid complications down the track. If you need more budget, then don't be afraid to ask for it!

4: To control change

You need to be the one who controls all change to the project scope, tightly. "Scope creep" kills projects. Define the scope of the project upfront and then review it each week to make sure that you're not doing un-authorized work at any time. Your customer will ask for change throughout the project. Don't always give in. Stay your ground and when this happens, ask for more time or budget to cater for it. Remember—no matter how many changes they ask you for, they will still beat you up if you’re late or over budget. So control change when you see it.

5: Communicate

It's your job as a Project Manager to communicate the status of the project regularly. If people know it's on track it will motivate them. If they know it's late it will motivate them even more. But they will only know if it's on time or late if you communicate this to them.

You need to communicate the project status to your team, project sponsor and client every week of the project life cycle. Never miss a week. Always document the status accurately. Never exaggerate. Communicate the right messages t the right people at the right time.

5 Main Responsibilities of a Project Manager

Plain Talker (Communication)

It's critical that a project manager be the conduit of all things factual, timely, and relevant. You are responsible for removing any ambiguity or confusion around a project through plain talk and crystal clear communication. A successful project manager also employs a smorgasbord of communication methods ranging from face-to-face meetings to group presentations.

Risk Averter (Risk Management)

Identifying, preventing, and mitigating risk is a key responsibility of project managers. You can have the best project plan in the world, but the second it hits the open seas there is danger all around. You need to ensure your project remains viable in the event something catastrophic occurs. This can be accomplished by bringing up the topic of risk every time you meet about your projects.

Obstacle Remover (Issues Management)

There are always going to be obstacles that will slow down your project. These typically include delayed approvals, administrative busywork, and making sure everyone has the right equipment and materials to do the job. Do your team a favor and stay one step ahead of them to clear the path. They will appreciate the fact that they can focus on what they do best while you focus on what you do best.

Morale Builder (Manage Staff)

The project environment is a pressure cooker. Things may not be going as planned and your team may be buckling. It's your responsibility to let some of the steam out so that they can get through tough times. Keep your team focused on the end goal, use levity and humor where appropriate, and keep hope and morale high.

Bottom Line Focus-er (Manage Schedule/Budget)

Whether your projects bring in revenue or not, it's your responsibility to keep focused on the bottom line. You can do this in two ways. The first is to ensure you keep you keep your projects within budget. Projects consume resources and resources cost money. You need to be a financial steward of these valuable resources and manage them carefully. Second, always look for opportunities to do things better, faster, and more affordably. Both of these efforts contribute to the bottom line of your company.

What do you get when you focus on the meat and potatoes of these five main responsibilities of a project manager? You become a plain talking, risk averting, obstacle removing, morale-building, bottom-line focused project manager! Who wouldn't want to have someone like that heading up their next project?

How to Track Project Expenses

Manage your project expenses with these simple steps.

Step 1: Identify
You probably already have an idea of the kind of expenses your project will incur. Your project team members will have their views as well. The first step is to identify all the costs for the project.

You can do this by brainstorming with your team. Go through the project plan and work out which tasks require you to spend money. Note everything down so you have a consolidated list.

Step 2: Record
Take your list and get it into a format that you can refer to easily. Try using the Expense Tracking form in ProjectManager.com to record all your expenses so that you can access it from anywhere.

If you don't make it easily accessible there is a risk that you'll end up forgetting to add additional expenses and your project will go over budget. With your list always handy, you can update it and add new things.

Step 3: Monitor
You now need to monitor how much you are spending against the expenses you planned. So keep your Expense Tracking form up-to-date with how much you actually spend.

This will give you one clear view of the truth, and allow you to instantly see the total amount spent on your project so far. With this information easily available, you can always be sure that you are managing your project within budget.

Step 4: Report
Reporting about project expenses can be difficult. As soon as you have put together the report, it is out of date. Using software to produce your reports makes it easy to report on the current situation.

Using templates and dashboards for reporting gives you confidence that you are seeing the figures in real time. Accurate reports can be a very powerful tool for you and your project sponsor. They can help you see if the project is likely to deliver within the approved budget, or whether you will need more funds to complete it.

Step 5: Revise
Your reports are a great way to see if the project is on track. If it isn't, look back at your Expense Tracking form and check that everything is included. Revise any estimates that you need to. This makes your expense forecast more accurate.

By creating a list of expenses and updating it regularly with actual figures, you'll be able to manage your project budget more effectively

The Value of Project Templates

We're often asked "Why are templates so valuable" so we thought we'd answer the question in this newsletter. There are 5 great reasons why managers and teams find templates so useful. Here they are:

They save you time

On every new project, you have to create new documents to plan, track and report on status. This takes time, especially when many of the documents you create are going to be a one-off. So to save time, use templates to create your documents quickly and easily.

If the templates you use have been well written, then they should be pre-formatted with all of the sections, tables, charts and forms you need. This way, you can avoid having to spend time formatting your documents and purely focus on completing the content. On average, most people save 25% of their time completing project documents, by using properly formatted templates.

They give you direction

In addition to saving you time, well written templates step you through the sections needed to write your document from start to finish. They tell you what you have to write, how and where. They give you direction, so it's crystal clear what has to be done to complete your document.

They make it easier

In short, a good quality template will make the task of creating a project document as easy as 1-2-3. You don't have to stress about what needs to go in your document, how to format it or how to write it up. The template will tell you what information needs to be entered, and it should include practical examples to help you along the way.

They boost your quality

It makes sense that if you use high quality templates, then you will generate high quality documents. High quality templates should be professionally designed, written by experts and aligned with worldwide standards.

They give you confidence

Have you ever been asked to write a document that you're unfamiliar with or have never written before? If so, then you can use a template to get the document layout, tables, charts and completion instructions at your fingertips. All you need to do is to fill-in the gaps. By using templates to complete new documents, you will gain a higher level of confidence in your work, helping you to excel in project management.

How to Deliver Challenging Projects

There are 5 classic signs of a "challenging" project. We've described them below and offer you advice for managing them:

Tight Deadlines

If your project deadline is practically unachievable, then here's what to do. First, try and get it delayed. If you can't, then immediately replan your project so you know by how much you will be late. If it's more than 10% then try and find more resource to help you deliver it more quickly. And if you can't get the resource, then reduce your scope. Identify non-critical deliverables and get your sponsor to agree that you can complete those deliverables after the deadline has passed.

Otherwise, you need to revisit the tasks in your plan to see if you can produce the same deliverables, with less tasks and effort than before

Limited Budget

If your budget has been cut back, then try and find another sponsor in your business to provide the additional funding required. If cash flow is the problem, then negotiate with suppliers to take delayed payments. Use internal resource rather than external contractors, as they are usually cheaper. Rent equipment rather than buy. Re-negotiate with your suppliers to reduce their deliverables and therefore, their costs. And lastly, reduce staff overtime and offer them unpaid leave when they have down time.

Resource Shortage

If you don't have sufficient resource to complete the project, then take these steps. Review your deliverables and ensure you focus on the critical ones first. Try and find people in your business who can be seconded to your project, without you being charged. If you can't, then you need to work incredibly smart. So take time out each day to prioritize your tasks and ensure everyone is spending their time wisely. Work extra hours if necessary, but don't burn out. You can only work smart if you're "as fresh as a daisy".

Scope Changes

If your scope is constantly changing, then you need to nail it down. Start by identifying the tasks on the "critical path" and sticking to them, regardless of the change requests that arise. Identify your project priorities and get them approved by your sponsor. Make sure each priority is linked to a business objective, so that they are harder to change.

Being a Super-Hero

Does everyone expect you to be a super-hero by delivering your project with less time, budget and resource than you need? If so, don't worry - it's normal. The trick is to manage people's expectations, by under promising and over delivering. Keep people well informed, so they know what you'll deliver, how and by when.

By taking these tips, you can deliver challenging projects with a smile, and gain a reputation for super-hero like qualities!

How to Manage Multiple Projects

The following tips help you juggle lots of projects at once, without any of them falling on the floor!

Tip 1: Stagger Your Phases
There are various stages or phases that a project goes through to bring it to completion. These typically involve some form of Initiation, Planning, Execution, Control and Closure.
One trick for successfully running multiple projects at the same time is to stagger these phases as much as possible across your projects, so that they don't all occur at the same time.
For example, you don't want to have all 7 projects you may be managing, all have the Planning phase at the same time. This will consume an inordinate amount of our time as a planner and mistakes may be introduced to projects.
Instead, stagger the projects so you have some just starting and others just getting ready to finish up. You can do this by starting some projects earlier than necessary, or perhaps swapping projects that are in a different phase with someone else on your team.

Tip 2: Avoid Project Overload
Why are you managing lots of projects at the same time? It's probably because you're a good Project Manager! Everyone knows you are capable and competent and your projects end up being successful. So your name is at the top of the list when the question is asked "who should this project be assigned to?"
This is a compliment that can backfire in the long-run. There are only so many projects you can manage before you get overloaded. So know when to ask for help or say "no" to a new project if your plate is full.

Tip 3: Don't Share Dedicated Resources
Managing multiple projects requires multiple resources. One of the worst things you can do is to share your dedicated resources with other Project Managers on other projects.
For the same reasons that you're becoming overloaded as you're great at your job, your staff will get pressured to take on more projects if they are good at their job as well. So try and limit that pressure by keeping them allocated to your projects and not "sharing them out" too others. Otherwise they will be spread too thinly and that won't help your delivery. So protect them as much as possible.

Tip 4: Delegate the Details
If you only manage a few projects, then you probably know every task, contingency plan, risk, and detail for each project. But if you're managing lots of projects, then those days are long gone. You will need to delegate these details to someone else on each project team, to keep track of.
To do this, find assign someone in your team who is detail-oriented, fact-conscious and has a very good memory. Assign them as your 'go-to' person if you need to dig into the details at any time. This will allow you to focus on the bigger picture of moving each project through it's various phases to completion.

Tip 5: Manage Expectations
A common thing people forget when managing lots of projects is stakeholder expectation management. You need to keep everyone informed of the status of your projects and up-to-date with what's happening at all times. It will make your job much easier.

The 5 Steps to Planning Your Project

Creating a project plan is the first thing you should do before taking on any kind of project. Follow these 5 steps to put your project plan together...

Step 1: Define the Project Goals
The first thing you need to do is define the project goals. These goals are the very reason or purpose that this project is being contemplated. How do you do this? The best way is to conduct interviews with any and all stakeholders that have an interest in this project succeeding. Focus on their true needs that will create real benefit and value once the project comes to completion. This will result in a long list and there's no way you will make everybody happy. Take some time to prioritize the goals so the most important ones are worked on first.

Step 2: Identify Project Deliverables
You now have a prioritized list of goals in hand that this project must meet. The next step is to identify the deliverables necessary to meet these goals. These deliverables could be something as tangible as opening a new facility or as intangible as improving training for the call center. Identifying as many deliverables as possible will create the basis for your Work Breakdown Structure (WBS).

Step 3: Determine Who Will Do the Work
The next step in the project planning process is to determine who will do the work. This becomes easier to define now that you have the deliverables identified. There's a logical path to follow as the ownership of deliverables is usually self-evident. For example, you know the training department will be responsible for creating user manuals and the IT department will be responsible for upgrading everyone's hardware. You can then get down to an individual resource level as the plan progresses.

Step 4: Establish a Project Schedule
Now that you know the goals of the project, what needs to be done, and who will be doing the work it becomes a simple matter to assemble a project schedule. The best way to do this is sit down with the owners of the deliverables and explain to them clearly what must be accomplished. Obtain their feedback for how long each deliverable will take and when they feel the work can begin. It is unlikely at this point that the schedule will work out perfectly, but this will serve as a starting point for negotiations around deadlines, resources, and scope.

Step 5: Create Supporting Documentation
There are literally dozens of supporting plans that can augment the project plan. You can determine how much or how little of that documentation you want to pull together based upon the complexity or visibility of the project. But, there are a handful of supporting documents that you will always want to include in your project planning process. These are:

- *Communications Plan* - This plan determines how everyone will be communicated with as it relates to project status. This includes how the weekly progress report meetings will be conducted, how escalations will be handled, and which stakeholders need to know which information throughout the life of the project.
- *Risk Management Plan* - This plan identifies those things that have the possibility of going wrong on a project and turning into big issues that could knock it off track. Be sure to include not only the risk, but also what is being done to mitigate the risk.
- *Change Management Plan* - There is almost a 100% guarantee that something is going to change on your project. Be sure to have a process in place that acknowledges the fact that change will occur.

Following the 5 Steps to Planning Your Project above will change "Ready, Fire, Aim" to "Ready, Aim, Fire" and help you get more done in less time!

Create a Project Plan in 3 easy steps!

The Project Plan lists all of the activities required to complete the project as well as the milestones, dependencies, resources and timeframes involved. The following diagram depicts the 3 critical steps involved in creating a Project Plan:

To create a Project Plan, you first need to define the *Work Breakdown Structure* ("WBS"). The WBS lists each of the phases, activities and tasks required to undertake a project. You will then identify the resources required to carry out each activity listed. And finally, you will construct a *Project Schedule* which describes the flow of tasks and the timeframes involved in completing each task specified. A more detailed description of each of these steps follows:

Step 1: Define the Work Breakdown Structure

The first step taken when creating a detailed Project Plan for your project, is to create a comprehensive Work Breakdown Structure (WBS). The WBS lists all the phases, activities and tasks required to undertake the project. Identify and describe each phase, activity and task required to complete the project successfully. Depict the order in which the tasks must be undertaken and identify any key internal and external project dependencies. Also list the critical project milestones, such as the completion of key project deliverables.

Step 2: Identify the Required Resources

Having listed all of the tasks required to undertake the project, you now need to identify the generic resources required to complete each task. Examples of types of resource include: full-time and part-time staff, contractors, equipment and materials. For each resource type, identify the quantity required, the delivery dates and the project tasks in the WBS that the resource will be used to help complete.

Step 3: Construct a Project Schedule

You have now collated all of the information required to build a detailed Project Schedule. To construct your schedule, you need to:

- List the phases, activities and tasks
- Sequence the phases, activities and tasks
- Add key internal and external *dependencies*
- Allocate relevant completion *timeframes*
- Add additional *contingency* to mitigate risk
- Assign *resources* required to complete tasks
- List critical delivery *milestones*
- Specify any *assumptions* and *constraints*

And there you have it! By following these 3 simple steps, you can create a comprehensive Project Plan to increase the likelihood of success of your project

5 Steps to Delegating Your Tasks

Step 1: Put Yourself in a Position to Delegate

Delegation is when you assign responsibility to another person to carry out a specific task . The task could be large (such as "revamp our train-ing department" or small (such as "take this letter to the post office").

It doesn't matter how large or small the task is. What matters is that there is *another person* that you can delegate the task to.

You don't have to have an empire of people around you that serve as your minions. Rather, you do need to put yourself in an organizational position that there are good people to whom you can delegate responsibility. These people could report to you directly. Or, there may be a group of people that are in a support capacity in the company that you could rely upon. Regardless, you need to be in a position to delegate tasks to others, if you want to get more done than you have hours avail-able in the day.

Step 2: Get Ready Mentally

The second step is to make sure you have mentally accepted the fact that you need to delegate to others. You may be hesitant to delegate to other people for a number of reasons.

You may fall into the trap of feeling that it will be faster to get something done yourself rather than having to explain it to others. Or, you may feel as if the other person already has enough to do and you don't want to add more to their plate. You need to move beyond this type of thinking in order to effectively delegate your tasks. You will never be able to grow as a project manager if you feel that an-other person can't do something as fast or as proficiently as you. Sure, the first couple of times may be a bit rough, but you will be surprised how much easier things become. You'll also be pleasantly surprised when you find they can do something even better than you!

Step 3: Create Your "To-Do List"

Your next step is to put your "To-Do" list together. Take some time to do this right. One of the best ways to do this is to clear your desk and pull out your favorite pen and pad of paper. Start thinking about all the things that you need to get done.

This doesn't have to be in any particular order. Include those tasks that are related to projects (such as updating a status report) to everything else (such as completing your open enrollment insurance form).

Let everything come out on this piece of paper. You can include person-al, professional or other obligations and commitments you have. You'll start to feel better as you begin to size up how many things are weighing you down.

Step 4: Cull Your List

You are going to have a sizable list. You will be amazed at how much 'stuff' you have on your plate to accomplish. Some of these things are extremely important and others now appear to be just a waste of time.

Go through this list and delete as many items as possible. There may be items on your list that are MONTHS old that you've been carrying in your head for that entire time. Get rid of it. There may be items that you at one time thought were important but now they just seem trivial. Cross them out!

You are now left with a purged and manageable list that you can delegate to others. Narrow your delegation list down even further by removing those items that ONLY you can do.

Step 5: Begin Delegating

Take this relevant and meaningful list of tasks and meet with those who are on your team. Let them know the process you've just been through and the fact that you need their help.

You need to focus on tasks that are in your area of expertise - where you can make the biggest difference for the entire team. You can then divvy up what is left on your list and spread it out amongst the team.

Your team will appreciate your request for help and that these tasks really are important to get done quickly.

5 Steps to Hiring the Right Staff

To ensure you hire the right staff for the right roles, take these steps:

1. Define the Role

Sounds easy, but defining the role properly is the most important step to take when recruiting new staff. You need to create a Job Description document that describes the:

- Purpose and responsibilities of the role;
- Reporting and communication relationships;
- Skills, experience and qualifications needed;
- Team fit and performance criteria;
- Salary, rate, commission and benefits; and
- Work environment and special conditions.

2. Find Top Candidates

Next, advertise the role both internally and externally. Make your advert as specific as possible by listing the key responsibilities. Explain the challenges that they will face. List any special requirements. Make it sound enticing, but don’t oversell it.

Then while the adverts are running identify your selection criteria for interviews, based on the characteristics in the Job Description.

When the adverts close, review your list of applicants against the selection criteria and choose between 3 and 5 applicants to interview.

3. Interview Candidates

Next, interview the selected candidates. Make sure you prepare fully for each interview, so don't just "wing it". For every interview, you should:

- Prepare a list of questions before you start.
- Cover all areas of the Job Description during the interview.
- Address any strengths and weaknesses from their CV.
- Consider the quality of the questions they’ve posed to you.
- Be specific, direct and to the point at all times.

Don't be afraid to take notes during the interview. You will find that if you're interviewing more than 3 candidates, you will need to rely on the interview notes heavily when progressing to the next stage.

4. Test Candidates

Depending on the type of role you're recruiting for, you may also want to formally test your candidates. Here are 10 ways that you can test candidates to determine their suitability against the Job Description:

1. Perform personality, competency and numerical testing.
2. Get them to send samples of work completed in the past.
3. Ask them to perform specific project tasks. For instance, if hiring a software developer, get them to write you an example program.
4. Perform a second interview with management.
5. Get them to meet the team and allow the team to ask questions.
6. Take them for lunch with your team and see how they socialize.
7. Get them to do a formal presentation to your team.
8. Seek 3 professional references, all from past employers.
9. Ask them for 2 personal references, for character checking.
10. Speak to their prior customers to confirm their competency.

5. Select Candidate

Based on the interview and test results, the next step is to select the right person for the job. If you have a number of people that you can't decide between, then here are your options:

- *Hire neither and start again*. It's difficult to do this as you've put in a lot of work to get to this point. But it may be better to start again than hire a candidate who will not meet your needs fully.
- *Hire both and deliver earlier*. In some cases you can split a Job Description in two and allocate the responsibilities to more than one person. It's challenging and risky doing this, but in some cases you can deliver the project earlier and at the same cost by hiring 2 gifted candidates at the same time.
- *Select the best candidate*. In most cases you're landed with this option. If both candidates are "on an even par", then don't pass the decision on to someone else, go with your gut feel. We could give you numerous statistical testing methods to choose the right person, but at the end of the day they have to be able to do the job and fit in with your team—and only you will know which candidate is best to do this.

Your ability to hire the right people will determine your success as a Project Manager. So take your time and use this recruitment process to choose wisely.

4 critical steps to creating a Quality Plan

To ensure that your deliverables meet your customers' requirements, you need to create a Quality Plan, by taking these 4 steps:

Step 1: Define the Quality Targets

We all know that it's pretty impossible to meet your customers' expectations unless you *draw a line in the sand* before you start. By asking your customer to state upfront exactly what it is that they require, you will greatly improve your chances of success.

Ask your customer to provide a list of their requirements for a solution to be delivered by the project. Then help them to list the key deliverables which once produced, will satisfy their requirements. For each deliverable, list its components and then go one step further - by describing the detailed *quality targets* (i.e. quality criteria and quality standards) to be achieved by each component. This will provide you with a comprehensive understanding of exactly what it is that must be produced by the project, to meet the expectations of your customer.

Step 2: Create a Quality Assurance Plan

The next step is to create a plan to *assure* your customer that you can meet the quality targets set. By scheduling a suite of Quality Assurance Reviews to be undertaken by an independent person to the project, your customer will be provided with a "trusted view" of the overall progress of the project and the likelihood of the deliverables actually meeting the quality targets agreed.

Step 3: Create a Quality Control Plan

Internally within the project, you need to create a schedule of "Quality Control" measures to *control* the actual level of quality of each deliverable, as it is being produced. Examples include putting in place peer reviews, deliverable reviews, documentation reviews and end-of-phase reviews. Each review will measure the deliverables produced and identify any deviations from the quality targets set.

Step 4: Define the Quality Process

Of course, creating plans for assuring and controlling the quality of deliverables is a good start. But you also need to put in place a Quality Process to ensure that each of the actions listed in the Quality Plan are undertaken as quickly and efficiently as possible.

How to Communicate on Projects

As a Team Member

It's easy to get sucked into email, meetings and discussions that consume your day and prevent you from *getting tasks done*. So try these tips to help free your time so you can focus on tasks:

1. ***Email:*** Ask your colleagues to only email you when something needs to be done, or if it's important. You need to reduce the email you receive each day to free time for completing tasks. "Noise" (through too much email) makes communication less effective. So keep email to a minimum.

2. ***Meetings:*** Only schedule meetings if you can't resolve something in a brief discussion. Then only involve people in the meeting that absolutely have to attend. Plan each meeting by writing the agenda and key objectives beforehand, so it's focused. Keep your meetings short and to the point.

   Also, always take minutes recording the decisions made. Send those minutes to those people that will be affected by your decisions and then store the minutes in your project folder.

3. ***Discussions:*** Minimize the number of discussions with colleagues during the day. Don't involve others unless you have to. Try and plan your discussions by using a tool like Skype to see if people are available first, as interrupting them by phone or in person will break their workflow.

   By minimizing email, meetings and discussions and keeping them focused and short, you're avoiding all of the usual "noise" that project teams usually generate. You'll not only boost your productivity, but you'll communicate much more effectively.

As a Manager

1. ***Reports:*** Generate project reports once a week to see if your project is on track. Then distribute those reports to your customer and management team. Explain any deviations from the plan and what you're doing to correct them.

2. ***Team Meetings:*** Hold a weekly meeting with your team, even if it's only 30 minutes. Communicate the status of the project. Tell them your goals, deliverables and timeframes that need to be achieved. Get everyones buy-in. Everyone must be on the same page and fully motivated, if you're to meet your targets.

3. ***Tools:*** Collaborate with your team online, using a software tool like ProjectManager.com. That way you can reduce email by holding focused discussions, sharing files and sending messages online, all in one place.

Remember-if you improve communication, then you'll improve your chances of success. It is that simple.

How to Create a Communications Plan

Using the Communications Plan template , we have described how to create a bullet-proof Communications Plan for projects. We have provided a snapshot of this template here by listing the 10 steps you need to take to create a Communications Plan for your project.

Step 1: Situation Analysis
The first step to take when creating a Communications Plan is to perform a *Situation Analysis*. This is a fancy term for researching your existing communications environment.

Review the performance of all communications within your project and identify the Strengths, Weaknesses, Opportunities and Threats.

Then identify any lessons learned from past communications exercises, so that the same mistakes made in the past are not repeated here.

Step 2: Communications Objectives
Great. So you know what your communications strengths are and where you need to improve. You are now ready to set out your communications objectives.

List the top three objectives that you want to achieve from your project communications. For instance, you might want to inform stakeholders of the project progress, boost management buy-in or improve your team productivity.

Step 3: Communications Guidelines
Then set out your communications *guidelines* for controlling communications within your project. For example, you may decide that:

- All messages will be distributed through pre-defined channels
- All critical communications will be pre-approved by management
- All communications will be tailored, based on stakeholder needs

Step 4: Target Audience
Now define exactly who it is that your team will formally communicate with. Remember, formal communications are a method for controlling the messages sent out by your team. They promote a single consistent view of your project to a specified audience so that "everyone has the same version of the truth".

Step 5: Stakeholder Needs
Each target audience group will have their own needs. These *stakeholders* will require information that is specific to their role in the project. For instance, a Project Sponsor will need to be informed of high priority risks and issues, whereas a Quality Reviewer might need to be notified of the current status of project deliverables.

Step 6: Key Messages
Then list the key messages that need to be sent to each Stakeholder. Key messages may include project status, project issues, project risks, project deliverables or project resources. The next step is to define how you will deliver each message to them, through a delivery channel.

Step 7: Delivery Channels
There are a huge variety of ways in which you can deliver your key messages to stakeholders (e.g. emails, newsletters, meetings, conferences). For each stakeholder, identify the channel that you will use to deliver your key messages.

Step 8: Communications Schedule
Now you are ready to create the schedule of communications events, activities and actions that are required to

deliver the right messages to the right people at the right time throughout the project. Create a detailed schedule of events and for each item listed, specify the timeframes for completion and any dependencies on other events in the schedule.

Step 9: Communications Events
For each event listed in your schedule, describe it in depth. Make sure that you define the purpose of the event, how it will take place and when it should occur.

Step 10: Communications Matrix
And finally, once you have listed the events and described them in detail, you need to identify who will manage them and who will review their effectiveness. Create a Communications Matrix which lists for each event who is accountable for the event, who will take part and who will review its success.

Once you have taken these 10 steps, it is up to you to get your Communications Plan approved by your manager and then execute it to deliver communications efficiently across your project.

And just one last tip - to improve your communications you need honest feedback on your team's performance. Implement feedback measures such as questionnaires, feedback forms and surveys to learn how to continually improve communications within your project team.

How to Kick Start Your Project

As a Project Manager, the New Year is a challenging time for your project. You have staff away on leave, you may have deliverables from last year that you need to catch up on and the clock is already ticking. So how to you catch up and then give your project the edge you need to get ahead? Here are 5 tips for doing just this...

Tip 1: Stop and get a grip
Projects are always ahead in some areas and behind in others. Stop and take the time to get a firm handle on the project progress. Make a list of all of the areas that you're behind in. Then prioritize the list and calculate the amount of effort needed to get them back on track. Are there any tasks that can be completed by others outside your team? If there are non-critical tasks that you can outsource, then now is the time to consider it. Use whatever resources you can find to complete these late tasks as soon as possible.

Tip 2: Rework the plan
Once you've caught up, revisit your Project Plan. Update every task in the plan and recreate your schedule ahead. You need to revitalize your team and to do this, you need a newly worked project plan that shows how you're going to deliver the rest of the project on time. This will boost motivation and enthusiasm for completing the revitalized plan. Especially if your team can see that it's actually achievable.

Tip 3: The Road Ahead
Now that you have a crystal clear plan ahead, you're ready to get the team behind it. Take your team out for lunch. Walk them through the remaining challenges and the timeframes in which they must be achieved. Try not to talk about the prior period or any failures to date. Instead, be positive and focus on the road ahead to gather their support. If possible, ask a customer to come along, to impress on your staff what it is that they need to deliver and by when. Tell them you're proud of them and what they're capable of achieving.

Tip 4: Individualization
The trick now is to make each person feel like they are a critical cog in the wheel. Meet them individually, reward their successes and recognize achievement whenever you see it.

Tip 5: Quick wins
A winning team likes to know they are winning right from the start. Focus on delivering a couple of critical tasks early, and then shout about the success. Then get more quick wins under your belt and shout out about your successes again. This creates the feeling of achievement and it creates momentum in the team. Sure, the project may not be finished until you've crossed the finishing line, but half the fun should be in getting there.

By taking these 5 tips, you can kick start your projects to boost motivation to an all-time high.

Top 10 Reasons for Project Success

#1 - Details are Closely Managed
If the devil is in the details, there is nothing more devilish than the complex and intertwining dependencies of a project. You stay on top of the details. When the project moves from point A to point B, you question those who say the details have changed and make sure to understand how it happened.

#2 -Big Picture is Understood
It's just as important to see the big picture as well as the details. Understanding the overall purpose and goal of the project allows you to make decisions and resolve issues that arise.

#3 - Decisions are Quickly Made
Paralysis by analysis is the bane of many successful projects. You use the best information you have available to make decisions quickly. Even if it's not the BEST decision, a GOOD decision suffices in nearly all cases.

#4 - Communication is Rampant
You can never have enough communication. If the worst thing is that somebody says they already know what you just told them, great. They have retained more than what your general audience remembers, which is about 10%. The reality is that you will have to deliver a message ten times before total recall happens.

#5 - Risks are Kept at Bay
Risk brings projects to a grinding halt. In successful projects risks are actively identified, managed, and squashed at every opportunity.

#6 - Expectations are Properly Managed
These days, it seems so cliche to say we manage expectations; who doesn't? As a matter of fact, a lot of project managers don't, becoming so consumed with day-to-day operations that clients or project sponsors are neglected. You spend quality time with stakeholders to ensure their expectations are met and managed.

#7 - Approvals and Sign-Offs are Respected
It's easy to get caught up in the momentum of a project and disregard the approval process or signing off on changes, plans or deliverables. You make sure appropriate parties are okay with a project moving forward.

#8 - Everyone is Involved for the Duration of the Project
At the outset, slews of people attend meetings, ask questions, and more importantly provide input for the direction a project should take. You keep these stakeholders involved throughout the entire duration of the project, not just at the beginning.

#9 - Meetings are Held Regularly
It's tempting to get together only when there are big problems, but when status meetings, project reviews, and other meetings are held regularly, it minimizes the risk of issues getting out of hand.

#10 - Good Relationships with Project Sponsors are Cultivated
You foster a good relationship with the project sponsor or client. The resulting trust allows you to smoothly navigate through troublesome times that may arise on the project.

How to Manage your Project Team

There's not one 'best' answer to managing your project team but rather a number of different things you can do to get the most out of your team. The following are a few of these things you can do to manage your project team:

Group Meetings

There's nothing like a group meeting to manage your project team. The best time for a group meeting is early in the week, preferably Monday morning. The purpose of this meeting is to make sure that everyone is aligned, expectations for the week are set, and any issues or obstacles are addressed and resolved. Ideally, this meeting takes place face-to-face allowing everyone to contribute to the discussion and get the most out of it as possible. This is your opportunity as a project manager to address the needs of the group and make sure everyone is on the same page.

One-on-One Meetings

Another great opportunity to manage your project teams are the one-on-one conversations you have with individual team members. This type of conversation can take various forms. A regular weekly meeting can be set up with team members that may be new or have minimal experience. This can take 30 minutes or less and serve as a time to touch base with them, make sure they are not having any problems in getting their work done, or discuss any other topics that would not be appropriate to bring up in a larger meeting. One word of caution... don't use this time to talk about any disciplinary or corrective actions that need to be addressed. That should be left for a separate meeting.

What if you have more experienced or senior members on your team? This is still a great way to manage your team, but it can take a slightly different form. First, it could be reduced to once or twice a month that you get together. Plus, the focus of the meeting can be to discuss any ideas or suggestions the team member has for improvement or making things better. At this point in their career they won't need too much direction, but they will appreciate the opportunity to provide their input.

E-Mail

There's nothing better than face-to-face meetings when it comes to managing your team. But, email can be a powerful addition to these face-to-face meetings to document and clarify the results of what was discussed. Email is a perfect vehicle to regularly "net out" where things stand on a project. An important role project manager's play is to sift through the clutter that surrounds projects and pull out what is most relevant. Your team will appreciate the time you take to keep them up to speed this way.

Be mindful to not let email take the place of face-to-face. It's easy to go down this path feeling that it's faster or less complicated than talking in person. Email should always be in addition to, not instead of, talking to your team in person.

Reports

You may not typically think about reports as a way to manage your project team, but if you create your reports in the right way you will find they can be a useful tool. What is the right way to create reports that can help manage your team? Make them actionable. Making a report actionable means that someone can read the report and then know exactly what needs to be done next. The report will not be muddled with a lot of unnecessary details or information that could lead to confusion.

Build Camaraderie

It's good to build relationships on the project team beyond just yourself and the team members. A highly performing team that is easy to manage will have relationships amongst themselves as well. Your part of managing this team is to create opportunities where this can occur. For example, take your team out to lunch every now and then, get involved in some real (not cheesy) team building exercises, or take them bowling! Everyone loves bowling, it's an easy budget item to approve, and you're sure to have a good time with the entire team.

The above are some practical ways you can manage your project team. The spirit of managing your team can be summed up in two words... be available. Your projects will do well if your team knows they can reach you at any time with questions, issues, or suggestions and feel comfortable in doing so. Your group meetings, one-on-one conversations, email, actionable reports, and camaraderie building will keep you in that position of availability.

5 Tips for Managing Your Project Teams

Getting buy-in from your team and keeping everyone on the same page is not easy. But if you can do these five things really well, then your teams will thrive and your projects will come to completion...

1. Listen Intently to Your Team

Everyone likes to be heard. This is especially true when people are talking about their opinions on the best way to complete a project. It's important for you to listen intently to everyone on your project team. Does this mean that you will do everything your team suggests? Of course not! That would be impossible as what one person suggests may be in direct conflict with someone else's suggestion. But, it does mean that you have taken the time to listen to someone's ideas, asked them questions, and then taken the time to explain whether or not their ideas will fit into the big picture of the project.

2. Over-Communicate with Your Team

How often have you heard "I didn't know that" from someone on your team when you know the topic was recently discussed at a meeting you all attended? This is a common occurrence that has been the nemesis of many project managers. Take a lesson from product marketers. There is an adage that says someone has to hear something up to 7 times before they take action on the message. Marketers will present the same message in different ways, at different times, and in different formats until something finally clicks with their potential buyer. You need to do the same thing as a project manager. Hopefully, you won't have to repeat yourself 7 times, but look for opportunities to make sure your team members clearly understand your message and always err on the side of over-communicating.

3. Create (and Stick to) Clear Ground Rules for Your Team

Didn't you hate it as a kid when you were playing a game and the rules always seemed to change? Just as soon as you thought you had figured out how to play, someone came along and said things were going to be done differently. What's worse, this was usually to your detriment!

That was bad enough as a kid, but it really gets frustrating when you are an adult trying to complete your project. It's your job as a project manager to create reasonable ground rules and make sure everyone plays by them. These reasonable ground rules include what reports are due and when, how disagreements or conflict will be resolved, expectations for individual performance, and when issues need to be escalated. It's equally as important that you maintain consistency across all team members on the application of these ground rules and not change them on a whim. One word of caution...keep ground rules to a minimum. You don't want to overwhelm your team with a ton of rules that do nothing more than bog people down and prevent work from getting done.

4. Change Your Management Style as Your Team Evolves

There are a number of development stages that project teams will go through as they start working together. These are typically categorized as Form (coming together), Storm (initial conflicts), Norm (things begin to smooth out), and Perform (the machine is up and running). To effectively manage a project team it's important that you understand the behaviors, cares, concerns, and anxieties of team members in each phase and manage accordingly. For example, during the Storm phase of group development you will be serving as more of a moderator, facilitator, and possibly even mediator. You will be very hands-on and spending an inordinate amount of time with team members as they work through these issues. Once they have reached the Perform stage, however, you want to back off and give everyone their room and independence to get their work done with minimal intervention.

5: Empower Your Team Members

Here's a sure-fire way to get people to quit in utter disgust and frustration...give them a task to do without the proper level of authority to get it done. You can inadvertently do this a number of ways. The first is by making them check back with you every step of the way to ensure they are making the right decisions. This is a morale-killer and screams "I don't trust you!" The second is to give them a task that is beyond what they can handle themselves at this point in their career. You are only setting them up for failure and embarrassment if they don't have the skills necessary to get the task done. Remedy this situation and set them up for success by mentoring them through the process and build up their confidence. So that's it. If you listen to your team, over-communicate, create and stick to clear ground rules, adapt your management style as the team evolves, and empower them to get things done you will find that your project team can't wait to work with you on the next project you manage!

How to Monitor Your Projects

There are multiple ways to monitor your projects. There is no right or wrong method, nor one that works better than the next. It is up to you as the project manager to understand the nuances of your project, team, and environment and choose the one that works best for you.

Method One: Remote Control

The first way to monitor your projects is by means of remote control. This means that you are getting a sense of what is occurring on your project by reviewing the project plan, using email, or picking up the phone and calling a team member every now and then. The remote control method doesn't incorporate much face-to-face time with the team and much of the time spent on managing the project is from behind the desk and using a computer.

This method works well if it is a small project or one that is not missioning critical. This would be a perfect method to use if you volunteered to help a peer or colleague out. This falls into the category of having some project management expertise on a project is better than none at all.

Method Two: In Their Face

The "in their face" method is on the opposite side of the spectrum of the remote control method. This is when you are side by side with the team and immersed in every detail and providing ongoing and incessant direction. You are able to monitor the project very effectively this way because you intimately know every aspect and detail about the project. Some may call this micro-managing...and they're right. But, there is a place for micro-managing in some cases.

This method works well if there is brand new team of junior people that have not been through many successful projects. They will appreciate the hands-on monitoring, approach, and real-time feedback as they come up to speed on the current project.

Method Three: Can't We All Just Get Along?

The third method to monitoring your project is much more collaborative in nature than the first two. This method involves regular meetings, updates, and other forms of real-time communication that keeps the team moving forward. This is where the agile method of project management comes into play where there is more a group of peers working on completing a project rather than a top-down hierarchical approach.

This is a great method to monitor the project if you are working with a team of experts that are moving into unknown or uncharted territory. It's good to work collaboratively and keep up with what is going on with the status of the project.

Method Four: The Assumptive Close

The fourth method you can use to monitor your projects is the assumptive close. An assumptive close is when a sales person takes you down the path of buying something with the assumption that you are going to buy whatever it is they are selling. For example, they would ask "do you want this item in red or white", rather than "do you want this item?"

This is a great method to use when you work with busy professionals. Rather than say "did you do this?"...which can come across as condescending, you would say "how did this turn out?" This allows you to monitor the project while giving everyone the benefit of the doubt. You assume that the deliverable is complete and it's up to them to tell you otherwise.

Method Five: Auto-Pilot

Auto-pilot is just that...automatic pilot. This is when you sit in the cockpit, get the plane off the ground, and then turn it over to auto-pilot to take it the rest of the way. This allows the pilot to sit back and enjoy the ride himself, as long as the flight is going well.

This method of monitoring projects works extremely well for projects that meet the following criteria: 1) It is a seasoned and experienced group of people that have been working together for a long time and, 2) the project is something that has been done time and time again. The risk to this method is that you better be prepared to jump in and handle things if the going gets rough.

There is no right or wrong way of monitoring projects. It is up to you as the project manager to determine what is going to work best for you and your team. You may find that you start with one method (in their face, for example) and that it may easily transition over to a "why can't we all just get along" approach.

How to Track Your Projects

It's a tough challenge; juggling people, equipment, time, money and materials to complete your project on time. To do it successfully, you need to keep an eye on 5 key areas of your project...

1. Time and Cost

Put an hour aside every week to determine if you are likely to complete the project on time. To do this, identify any tasks that are running late and determine whether they are likely to delay the overall project. Then look for ways that you can save time by; finishing tasks earlier, delaying non-critical tasks to after the project has been completed, or gaining approval from your Sponsor to remove tasks altogether.
You also need to review the total spend of the project to date against the original budget set. Identify ways to reduce costs by allocating cheaper resource, reducing the project scope, or boosting the efficiency of your team.

2. Resource Allocation

You need to keep a constant watch on the percentage of time that your team are allocated to tasks. If you have one person allocated to tasks 50% of their time and another 150% of their time, then you may not be working efficiently. Instead, balance workload fairly so that your team are kept busy 80-100% of their time, without being overloaded. If you intend to overload resource, then only do it for a short period of time, to avoid "burnout".
As you reallocate work among your resources, keep an eye on the overall resource level. It may be that everyone is under-allocated and you can take a person off the project, saving on cost. On the other hand, if everyone is over-allocated then you may need to quickly allocate more resources to the project as soon as possible.

3. Progress and Efficiency

You also need to track the progress and efficiency of your team. 'Progress' means the percentage of tasks completed to date. 'Efficiency' means the number of tasks completed on time. You need to track these items to ensure that you are progressing according to plan and that your team are working efficiently in completing tasks assigned to them. ProjectManager.com is one of the few online software tools that provides you with progress and efficiency information, as well as the usual project planning and tracking features.

4. Risks, Changes, Issues

Every project encounters risks, changes and issues at some point. It's often impossible to prevent them from occurring, so the trick is to resolve them as quickly as possible when they do come up. Throughout the project life cycle, you need to watch them closely. For each item raised, set a 'target resolution date' and track these dates carefully to make sure that they are adhered to.

5. Project Health

In addition to tracking the project at the micro level, you also need to stand back and take a look at the project from a helicopter level. You need to gain a clear view of the overall project health. You've already done most of the work by assessing the time, cost, resources, progress and efficiency of the project. By also taking a summarized view of the project each week, you can lead the project team towards success.

Improve your Presentation Skills

So you've been handed a suite of new projects to manage. What's next? Take these 5 steps to make sure you don't end up working around the clock and pulling your hair out while you're at it...

Prepare with care

To give a great *presentation*, you need great *preparation*. Start, by thinking about your topic and the audience and what they are most interested in. Then list your key points and write down the general structure of the presentation ahead.

If you need to, write down every word that you want to say and memorize it. Experienced presenters don't need to do this. But if you're a little nervous or you're new to presenting, then by writing everything down it will boost your confidence and settle your nerves on the day.

On the day

Take these 5 tips to give a fresh, vibrant presentation:

1. Get good night’s sleep beforehand. Eat a healthy breakfast and try and free your schedule, so you're more relaxed going into it.
2. Before you present, spend 15 minutes going over your presentation.
3. Then concentrate on your breathing for 2 minutes. This focuses your thoughts, relaxes you and gets rid of any nerves.
4. Remember, the open and close of your presentation are the most important parts. So put in extra effort here, to make it memorable.
5. If you forget something or make a mistake, then never stop and apologize. Keep going and try and relax. It will soon be forgotten.

Body Language

It's said that 80% of a successful presentation is about body language, and only 20% is about content. So use these top tips to communicate the right message through your body:

1. Make eye contact with people at all times. Never stare at the ceiling or back of the room as you present, unless the nerves are too much.
2. Appear confident. Use an open stance, stand tall and proud. Smile and let your personality shine. Don't be overly formal.
3. Remember that relaxed body language conveys honesty and openness. So walk around a little and make use of props to hold onto.
4. Vary your voice and use slow, open hand gestures. Never have your hands in your pocket or play with a pen. Move your hands to an open position and then pause for effect.
5. Speak slowly and carefully, but passionately. If you're enthusiastic about the topic, then your listeners will be as well.

Spark Interaction

Encourage interaction with others during your presentation. By having others talk for a few seconds, it takes the focus off you temporarily, to let you clear your head and focus on the key points ahead. Another trick to clear your head is to pause while your team are reading a slide or considering a key points you've just mentioned. Public speaking is one of the most challenging things to master. But if you prepare carefully, take it slowly on the day and are enthusiastic about it, then you will deliver a powerful presentation to your colleagues.

How to Deliver Your Projects Successfully

These 5 tips will give you a head start:

Be honest

Always be totally honest and upfront with your customer right from the start. Tell them if their project is not feasible or if you don't have all of the resource, money and time needed to deliver it successfully from the outset. Set their expectations by telling them what you will deliver and by when. And if it eventuates that you can't deliver on your promises, then tell them about it immediately. By having an "open book" policy, you'll gain your customer's trust. If you involve them early enough, they will be more supportive for your project.

Manage through delegation

Managers often fall into the trap of believing that they can do things more efficiently than staff. Of course in many cases they might be right, but the problem is that they don't have the time to do everything themselves. So a smart manager always tries to delegate as much as possible to staff. It gives them the time needed to monitor the project and support their team. It's a tough ask, but even if you know you can do a task more efficiently than others, delegate whenever you can anyway.

Expect the unexpected

Always expect things to change and be ready for it when it occurs. People have ideas, your customer may want changes and the industry and technology change over time as well. It's not the change that's important, it's how you react to the change that counts. Always embrace change, but be wary of it. Question every change request and only when you're certain it's for the best, then implement it.

Become a great leader

When you save time by delegating your tasks, you have free time for leading and motivating your team. Do this by regularly communicating the project vision to your team, rewarding them for progress and recognizing their achievements. Gain their respect by showing them you care. Build team spirit by taking them to lunch regularly and talking about what they achieved together.

Work smart, not hard

Never start from scratch. Always give yourself a head-start by using tools. The templates boost the quality of your documents and they save you time and effort.

How to Resolve Project Conflict

Here's how to face and deal with conflict within your project team...

You need to face conflict and not ignore it, as ignoring it only makes the problem worse. The earlier you face it, the easier it will be to resolve. Here are some examples of conflict you might experience on projects:

- **Your boss** is frustrated with progress and takes it out on you openly, in front of others in your team.
- **Your colleague** wants something from you that you can't give them, or can't do for them within the timeframe required so they get angry.
- **Your staff** think you're being unrealistic about timeframes, so they handle it badly by raising their voice and being obstructive.

When conflict occurs, take these steps:

- **Time out:** If the other person is getting heated, tell them you need to take five minutes to collect your thoughts. Then make a coffee or go for a walk. This will help you both to calm down and reflect on what has happened.
- **A pacifier:** When you restart your conversation, start with "I know that you're under pressure because of... " This will pacify them a little and will make the atmosphere more positive.
- **Problem solving:** Then agree that a problem exists and that you both need to work together to resolve it constructively. Discuss the various solutions to the problem and try to agree on the pros and cons of each before deciding on the best course of action.
- **Body language:** While all this is happening, you need to focus on your body language. Use open stances. Take your hands out of your pockets and never fold your arms. Try and use slow hand movements. Use a passive voice and don't show emotion. Maintain good eye contact. Listen carefully and watch their body language as well.
- **A mediator:** If the above steps are going poorly, then you need to get someone else involved who can help mediate informally. Tell them you'd like to add a colleague to the conversation as they will have ideas for a solution. Then invite someone who is a good problem solver, whom you trust.
- **Giving feedback:** When the conversation becomes a little more relaxed, it's time to give the person some constructive feedback. Let them know how you would like them to deal with you next time a similar issue comes up. Only by giving positive constructive feedback, can you change their behavior.

One great way to avoid conflict within teams is to use the same Templates for projects. If everyone uses the same Project Management Templates then there's no dispute about what it is that needs to be done and how to do it. Everyone will have all of the tools they need to get on with the job.

Top 5 Types of Project Reports

Focus on what's important by zeroing in on these top 5 types of project reports:

Report 1: The Project Status Report

The Project Status Report does just that...it provides the general status of the project. This mid-level report should be detailed enough to answer questions about the current health of the report yet not-so detailed that people who read it are lulled to sleep with trivial details. This report should answer the following four questions:

1. Where do things currently stand with this project?
2. What are the next steps on this project?
3. What obstacles are in the way of this project coming to completion?
4. What are the key metrics about this project?

Report 2: The Risk Register

The risk register, or summary of the risk register, is another vital report you want to create. Risks are always lurking in the background of any project just waiting to knock it off course. The risk register identifies those risks, quantifies the potential negative impact they could have on a project, and then offers mitigations plans for each of the identifies risks.

A summary of the risk register could feed directly into the Project Status report as one of the key metrics. For example, you could show the total number of risks that are still open on a project and categorize these by severity. This will give the reader of the report a good indication as to the general state of risk that is associated with each project.

Report 3: The Issue Log

The issue log report is your way of dealing with risks that have either come to realization or an unexpected event occurred. For example, the risk may have been that a particular key resource could find another job and delay the project. The Issue is now that the project is delayed because that resource did find another job. Or, an issue may be an unexpected event such as a coding issue on a software deployment that brought the software to a grinding halt.

This report should show what is ACTIVELY being done to address each issue and prioritize them by area of impact on the project. This can range from "Showstopper" to "Minor Cosmetic" and will then serve as the marching orders for everyone to follow in order to get the project back on track.

Report 4: The Executive Summary

The Executive Summary is a very unique report that is written in a different language than the reports mentioned above. The Executive Summary is a high-level report that can provide a solid understanding of the project status, benefits it will yield, how the project fits into future strategies, and ultimately improves the bottom line of the company. This is written in the mindset of a busy executive who has moments to spend on one of many projects and initiatives that are under their purview.

Keep this report objective and factual. Paint a realistic picture as executives know that everything does not always go as planned. They just want to know that you have a plan for how to corral the project back to where it belongs.

Report 5: Whatever you Want

This is not meant to be a flippant statement. What it is meant to be is a reflection on reality. The reality is that it is hard to have just the right report for every company, project, circumstance, or audience. It's up to you as the project manager to combine the best aspects of each report and come up with whichever one works for you. You'll learn over time which pieces of information are relevant on a report and get the most action and reaction from those who read them.

Make sure this report is easy to generate week after week. You want to spend more time working on what the report tells you rather than working on the report itself.

How to Create Your Project Dashboard

A "Project Dashboard" is a tool that provides you with a graphical view of the progress of your project, so that you can see at a glance whether you're on track. It's basically a set of Charts that gives you the current status of the project at any time. You can create the Charts manually in Excel, or use smart software that does it for you.

To create your own Project Dashboard in Excel, take these steps:

Step 1: Get a Pen and Paper
Sit down with a pen and paper and list the things that determine whether your project will be a success. It might be that your project is delivered on time and under budget. Or that tasks are completed when expected and that your resources are perfectly allocated. It's these types of things that your Dashboard needs to track, every day.

Step 2: Gather your Data
Then collate all of the data that is needed to measure the success criteria you've defined above. The data may exist in Project Plans, Excel spreadsheets or Word documents. It might exist also in Timesheets, Expense Forms and risk / issue / change logs. Remember, the quality of your Dashboard depends on the quality of the data that goes into it.

Step 3: Sift, Sort and File
You then need to *sift* through your data, *sort* it into groups and *file* it all in one place, so that you have the right information needed, to populate your dashboard.

Step 4: Create your Dashboard
You're now ready to build your project dashboard. Enter all of your data into a single spreadsheet and create the following charts to create your Project Dashboard:

- **Time Chart:** This chart tells you whether you're on schedule. You need to list your tasks and identify the *planned* versus *actual* percent complete for each task. Summarize this data and you'll find out whether you're ahead or behind schedule.
- **Cost Chart:** To find out if you're under or over budget, you need to add up all of your project costs and compare them to your budget. To do this, calculate the cost of your resources, as well as equipment, materials and any expense forms completed by staff.
- **Tasks:** You need to know the percentage of tasks that have been completed to date, so that you can get a feel for how much of the project has been done. List all of your tasks and identify whether they have been "Not Started", are "In Progress" or "Complete".
- **Resource:** It's important to know whether your resources are over-worked. To calculate this, list all of your resources and work out how many calendar days they have scheduled for the project. Then identify from your task list, how many days they have been assigned to tasks. If they have been assigned to tasks for more days than they have available in their calendar, then they are "over-resourced" and you need to reduce their workload.
- **Risks:** Every project involves risks, issues and changes. Make sure these are documented and identify whether each is low, medium or high impact. Then sum them up to find out how "at risk" your project is.

Step 5: Review it Daily
A fully populated dashboard will tell you at a moment's glance, whether you're on track. You need to populate your dashboard each and every day, to have the best chance of success.

Four Steps to Determine the Value of Training

Many businesses struggle with the question of whether they are getting their money's worth in sending employees to training. This question can be applied to project management training as well as any other type of business training. You know the cost side of training too well. But how do you tell what the business value is?

The most common way to determine business value today is to ask the trainee whether he or she thinks the class was valuable. This is very touchy-feely and doesn't give you much information to go on, but it is probably the most that most companies ask in terms of follow-up.

There is a process for more rigorously determining the value received for your training dollars. These ideas are not for the faint of heart. They take more preparation and they take more of that most precious commodity - time. But see if it makes sense, and whether the results of this process will give you a much better feel for the value that you are receiving from training. You can also start with some of these steps, and try for the rest later.

1. The trainee and their manager meet a few weeks before the training class to make sure the trainee is ready for the class. The manager and trainee identify opportunities where the trainee can apply the new skills on his job.
2. When the actual class begins each of the trainees completes an initial quiz showing his specific knowledge level of the class material.
3. A week or two after the class, the trainee completes a post-class quiz showing his current knowledge level in the subject. For the most part, it is exactly the same as the initial survey from activity #2 above. This is compared to the initial survey to provide some sense as to how much the trainee learned. If this survey comes out close to the original version, it may show that the training might not have been very effective.
4. Here is the key step. A few months after the class, the trainee and their manager meet again for a post-class assessment, which is a follow-up to activity #1 above. In this discussion, the trainee and manager discuss whether the class resulted in increased on-the-job skills and increased business value. Part of this discussion focuses on the opportunities that the trainee has had to apply the new skills. In fact, the training may have been superb, but if there have been no opportunities to apply the new skills, then the business value will be marginal.

The real test of business value is whether the class resulted in an increased skill level that can be applied to the job to make a person more productive. This cannot be determined immediately after a class. You need to wait a few months after the class to see whether or not the training has actually been applied to your job. This shows the true business value.