

10 Project Management Basics

You've called your team members into your office and asked them to coordinate a special project. It's a new sort of task for them, unlike your team's typical work, and they're unsure where to begin ...

- 1. Determine the goal.** Make sure everyone understands what they're trying to accomplish. With your help, they should state and define the goal in specific terms. Ask how things will be different for your team or enterprise once the project is completed. Your project should be tightly structured, carefully budgeted and scrupulously planned before your work begins. Build in time for unexpected snags along the way. Beware the tendency of the work to expand over time, otherwise known as "scope creep."
- 2. Define success.** How will a positive outcome manifest itself? What metrics will change for the better? Will productivity go up? Will employee turnover go down? Will spending be cut by 5%? Error rates by 10%? Identify the best ways to measure and verify that you've achieved your goal.
- 3. Be realistic and manage expectations.** Guard against setting expectations that are unrealistically high. Don't start a project by promising an unrealistic rate of return before you've researched all the possible outcomes.
- 4. Strategize.** Now it's time for your team members to retreat and develop a plan of attack. Ask them to plot the steps they'll take to make the outcome a reality, keeping in mind any limits (such as time and budget restrictions) you've set for the project. Assess each function you are working on. Define each stakeholder group's role in your existing process. Understand what you have and how it works so you can get to where you want to be.
- 5. Develop a project calendar.** Have your team establish a deadline for each step they've included in their action plan. If you don't think they've allowed enough time to complete a task, say so. A calendar will help them assess the viability of their action plan and stay on track during its execution.
- 6. Set up a monitoring system.** How are your team members going to keep track, on an ongoing basis, of where they stand on the project? And how are they going to keep you informed? Help them establish both a schedule and a method for checking in with you and each other.

7. Communicate! Now's the time for you and your designated leaders to brief the rest of the work group on the project. Aim to dispel fears, answer questions and generate as much enthusiasm about the project as possible, along with a sense of pride among the employees who'll carry out the plan.

8. Delegate! You've already delegated to the leaders you've chosen; now help them delegate to the rest of the team. Provide support as they give team members their individual assignments, but don't make those assignments yourself.

9. Have a kickoff. A special staff meeting, written project bulletin or social occasion helps build morale for the effort. Nothing fancy is required, but even small projects attain a sense of importance when you give them an official kickoff.

10. Monitor. Make sure you follow the monitoring system you devised—which means being available when your leaders need to check in with you. Stand ready to assist your leaders in coaching and counseling employees who are having difficulty meeting their expectations.

The Checklist

	Everyone understands exactly what we're trying to do.
	We've discussed and agreed on what we're <i>not</i> trying to do.
	We've defined what success will look like, and have hard metrics in place.
	We've set a deadline for finishing the project and discussed the ramifications if we miss it.
	Everyone knows their individual role in the project, is OK with the time constraints, and is working toward the same goal.
	A calendar has been set up and distributed, with no "fuzzy" dates.
	Everyone that this project might affect has been notified that it's a go.
	We've set a date when we will all get together after the project is done to talk about what went right or wrong.
	If the project begins an ongoing effort, we've set a date in the future when we'll meet to discuss whether we can call it a success or failure—and agree to either end the effort and move on or keep it going, depending on how we defined success and failure in the beginning.

PROJECT	
GOAL	
DUE DATE	
STAFF INVOLVED	
KICKOFF MEETING DATE	
POST-PROJECT REVIEW MEETING DATE	

TASK	START	FINISH	ASSIGNED TO	COMPLETED ON	HOURS	NOTES