Project Management for Non-Project Managers

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While some organizations may have dedicated project managers, today's professionals are increasingly taking on complex tasks that require project management skills. Approaching large tasks from a project management perspective will help you stay organized, reduce stress, and work more efficiently.

In this special report from Business Management Daily, we've collected our best advice on how any employee can use project management techniques to better organize their work. We've also included a project-brief template ready for you to use today! Whether you're a small business, Fortune 500 company, in-person, remote, or hybrid — we've got the insight you need.

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Professionals these days have more and more responsibilities to take over. With that, the lines between types of work continue to blur. As the size and complexity of that work grows, project management skills are needed to keep things under control.

Maybe you're a project manager and don't even know it. The differentiation may not sound important, but it can be. Approaching a complex task from a project management perspective will bring a level of clarity and organization to it that you otherwise may not have. This can greatly improve the quality of your work, while also reducing stress levels by ensuring you're able to keep track of all the complex moving parts of a project.

When starting a new project, determining if it needs a project management approach can help you ensure you're able to handle its twists, turns, and complexities.

What is project management?

Project managers maintain a leadership role on their team by ensuring everyone is up to date on what's needed to complete important projects within the company. As their name implies, project managers hold lead positions related to critical projects and see them through from conception to completion.

However, one doesn't have to be a project manager to apply project management skills to a task. Project management involves looking over the scope of a project and breaking it out into multiple smaller parts. Doing so allows you to think through the steps involved and have a good plan from the start. This lets you consider problems that might arise in advance, estimate accurate timelines, budgets, and much more.

Project manager tasks

While your role may not be in project management, understanding the type of work and skills project managers do will help you understand how they apply to

your own work. You can expect a project manager to complete tasks related to the conception, coordination, implementation, execution, and completion of projects within the organization. Their duties require that they focus on completing the task and the strategy behind it. They must consider how they're helping to reach the organization's overall goal.

Project manager core competencies

Here are the core skills expected of a project manager.

- Planning and organizing
- Decision-making
- Critical thinking and problem solving
- Communication
- Leadership
- Delegation
- Collaboration
- Negotiation
- Conflict resolution

Project manager duty checklist

Here are the common duties and responsibilities of a project manager.

- Lead the planning of the project
- Lead the implementation of the project tasks
- Determine the project scope, goals, and deliverables
- Set specific project tasks
- Determine resources required to complete the project
- Develop high-level project plans
- Coordinate staff to complete the project
- Manage the project budget
- Manage resource allocation
- Develop and monitor a timeline for the project
- Track project deliverables
- Support and lead staff working on the project
- Monitor quality of project deliverables
- Provide project reports to stakeholders
- Manage project changes as needed
- Evaluate and assess the results of the project upon completion

Where does your project fall?

While things may seem more clear-cut on a list, when it comes to real life it's a bit more difficult. After all, work tasks don't always neatly fall into one category.

For example, you may be tasked with overseeing a portion of the annual budget update process. On one hand, this could involve following strict directions and an outlined process. On the other hand, it could be more open-ended. If you're required to come up with a process for getting new budget proposals from each department, tracking the process, creating a timeline, and ensuring you have all the necessary documentation in on time, then considering the size of the project and its moving parts may be necessary to success.

In this case, you may want to take a more project management-oriented approach to the task. Consider outlining a project plan, highlighting key dates, and using a project tracking tool. It might just save you time, energy, and a little frustration down the road.

Project management styles

So you've determined that a project deserves the project management treatment. Now what? While there are many styles of project management and many iterations of those, Waterfall and Agile are the two most common techniques. These can also be adapted to fit your unique needs.

Waterfall project management style

Waterfall project management involves a clearly laid out process that is followed from start to finish. In this style, each task is finished completely before the next task begins. While less flexible than some methods, Waterfall project management works great for projects with multiple steps but fewer variables.

For example, think of a production line — one part needs to be completed before it can be attached to the next one. This method doesn't only apply to a production line, however. Let's say that you're responsible for ensuring the annual budget update process goes smoothly and that each department updates its numbers and submits the right forms in time.

You could simply take the forms, send them out to each department, and try to track them as they come back. However, a more organized process may serve you better.

Project kick-off

First, you'll want to have a project kick-off. Here you need to identify some key information like all the stakeholders involved, any specific deadlines that must be met, and the necessary steps that must be completed. Your kick-off should be thorough; after all, you want to craft a plan that you can adhere to from conception to completion.

Outline each phase

Now, you should outline each phase. In this example, most initial tasks must be completed before the next one can happen. So let's think about what that might look like.

1. Update last year's forms.
2. Draft budget update process guidelines.
3. Send an email to each department head with the form and process guidelines.
4. Leads fill out and submit forms.
5. Review submitted forms for accuracy.
6. Work with department leads to correct any errors, if applicable.
7. Submit completed forms to supervisor for review. - Due 5/18

You may wish to track more specific details under each main bullet. That's fine, as long as each task can only be done after the preceding task is complete. For example, bullet 2 may look like this:

- Update last year's forms.
  - Update dates and titles on existing forms.
  - Have supervisor review.
  - Make any changes.
  - Get sign-off from the finance department.

In this case, each sub-task needs to be done in order before the overarching task can be checked off. While you don't want to be too granular, documenting every single tiny aspect, you should be as detailed as is useful for you. This is your working document, so it should include a level of detail that will help you and those you're working with keep track of the project's progress.

Assign deadlines

There are two ways of approaching this. You can either work backward or forward.

To work backward, you have your end date in mind. In this example, it's 5/18. Let's say today is 4/18, leaving you 30 days to complete the task. You now know what time you have to work with and can start filling in the dates for each task along the way. So we'll assume you want to leave at least a week to review the submitted forms and work with department leads to correct errors. That means department leads need to have their forms submitted by 5/11. Assuming you want to give them 2 weeks to fill everything out, that means you need to send the forms to them in late April. This process lets you determine how much time is available for each step to ensure you meet the target date. Generally, it's advisable to leave some buffer time — if 5/18 is the due date, aim to have everything finished a few days before in case something takes longer than expected.

To work forward, you'll have to do a bit more estimation. If you don't have a specific or particularly tight due date, then you can look at each task and estimate the time it will take to complete it. This way, you'll eventually end up with a completion date for the project.

In some cases, you may need to do a bit of both. If, after working backward, you realize you should have started 2 weeks ago, then you'll need to look forward a bit and identify where there's room to shorten the time allotted to some tasks. Alternatively, if you feel the timeline isn't attainable, then this detailed outline will be a great resource to take to your supervisor to discuss extending the deadline.

Track the project

Generally, it's advisable to keep a document where you track the project progress. You could choose to use a more sophisticated project management program like Asana. Or you could build out an Excel sheet, or even a word document. Generally, you want to include each task, its due date, a progress update (not started, in progress, complete), and room for any comments.

Additionally, it's best for your project tracker to exist in a shared space somewhere. This allows others to check on the status of the project without needing to go to you directly. It's possible that deadlines may change or new tasks may come up. That's okay, but be sure to update your project plan and dates to reflect that. Generally, Waterfall project management isn't ideal for projects with many variables, but a few small changes here and there shouldn't derail a whole project.

Review the project plan afterward

As with any task, you'll want to review how the project went afterward. Did you stick to the plan? Did you have to make many changes? What went well? What went poorly? Ask yourself, and others involved, questions to get a feel for what worked well and what didn't.

If this project is something that recurs every year, then you want to make notes so that the process can be improved next year. Even if it isn't, you still may find valuable insights that you can use to improve upon other future projects.

Agile project management style

Things hardly ever go as planned. That's why Agile project management doesn't try to plan them. Well, that might not be entirely true. However, it does leave lots of room for changes as they come up. With this method, you'll keep your overall target in mind, but plan in smaller chunks along the way.

Project kick-off

First, you need to scope out the project. Start with identifying the end goal. Next, outline what you think the key steps are along the way. Let's say you're given the task to develop and implement a new process for handling building maintenance requests. Your list of key tasks may look something like this:

1. Do background research to identify existing problems and get user feedback.
2. Research and develop the new process.
3. Submit for approval.
4. Accommodate changes and recommendations.
5. Develop an implementation plan.
6. Roll out the new process to staff.
7. Evaluate the efficacy of the new process.
8. Iterate on the process to address any issues as needed.

Identify your key phases

That's a pretty good list, but it's going to be hard to fill out right in detail. After all, you don't know what the new process is going to be, so you can't begin to guess how you'll implement it and roll it out to other employees. This list is a guideline,

not a clear-cut walkthrough. Instead, what you want to do is group these tasks as phases. So your list might look like this instead.

1. Background research.
2. Process development and approval.
3. Develop an implementation plan.
4. Roll out to staff.
5. Evaluate and iterate.

Develop phase one in detail

Now that everything is broken down into larger chunks, you'll start to outline the details for the first phase only. Determine what you need to do and when it needs to be done. Background research might include looking at maintenance request surveys, seeking out feedback from users, researching best practices online, and more. It might also include highlighting the key problems that came out of your research and the basic criteria your new process should meet.

By this point, you should have a detailed outline for what your first phase will involve and a basic idea of what the likely next steps are.

Assign deadlines

Deadlines in Agile project management can be a bit more variable than other methods. In some cases, you may not have a tight end deadline in mind. If that's the case, then you can simply identify the deadline for phase one and create any sub-deadlines as needed, based on how long you think those tasks will take.

However, you may have a tighter deadline that needs to be met. In that case, you'll need to work back from the deadline to determine how much time to commit to each phase. Remember that these phases may change, so this is really only an estimate. Still, determine how much time should be set aside for each phase and note those dates next to each phase. Try to leave some buffer room so that if certain tasks take longer than expected, you can still meet the deadline.

Tracking the project

Agile project management involves a hands-on approach day to day.

Daily stand-ups

One common feature is a daily stand-up meeting (standing not necessary but encouraged). This is a 15-minute-or-less meeting to discuss what was accomplished yesterday and what's being worked on today. Its goal is to keep everyone informed and on the same page, without diving too deep into the details. Agile project management is supposed to be agile, so frequent check-ins ensure that you and your team can pivot quickly.

What this looks like may vary based on your needs, however. A daily stand-up might just be a quick check-in with your supervisor. On a larger project, it may involve meeting with multiple people involved. Even if your manager doesn't want a daily check-in, it can be valuable to do on your own. Simply note to yourself what you got done the day before, and what you're working on today. This will help you track your own progress and keep you on task.

Project trackers

Agile project management has many moving parts, which means you'll greatly benefit from some kind of formal progress tracking. Using a project management program can be hugely beneficial, but it's not necessary. Create an Excel sheet or Word document, or use another program of your choice to track each task along the way, when it's due, what the status is, and what's next. Make this available to any involved stakeholders so they can check in on the project whenever desired.

Keep in mind that with frequent check-ins, your next steps might change as you learn more. That's okay! Update your project plan and move forward.

Sprints

Agile project management is typically done in sprints, where each sprint involves the completion of a chunk of the project. These should generally align with the phases we identified earlier, though if a phase is exceptionally large, it may be broken down into multiple sprints.

At the beginning of each sprint, you'll outline the next steps, set dates, and evaluate your project plan. Back to our example, your first sprint is the research phase of your project that we outlined at the kick-off meeting. Once that task is complete, you'll evaluate the progress you made and your findings, and start to plan your next sprint, the process development phase. Fill in the details here and look at your overall plan outline. Does everything still make sense? Do dates need to be adjusted? The further along you get, the more you'll know what the later stages of the project might look like.

You'll keep working on the project like this until the end goal is finally complete.

Review the project plan afterward

As always, you'll want to review the project once it's complete. What went well? What didn't? These insights can help you in future projects. Additionally, Agile projects may sometimes be ongoing iterative processes. In this example, after a few months of the new process being implemented, you may want to get feedback to see how it's working. This could create a cycle of continual updates and improvements.

Project management tools

Larger projects, and projects with multiple people collaborating, often benefit from the use of project management tools.

There are a wide variety of project management software options available like Asana, ClickUp, Basecamp, and many more. In general, these allow you to create tasks, nest tasks within one another, assign them to others, create due dates, and much more. Most of these options are paid but have a free version as well. If you're just using it to keep track of projects for yourself, and perhaps one or two other people, then a free version probably works just fine. Consider trying out a couple of different tools to see what works best for you.

Project management software might not be for everyone, however, and in some cases, it may not be needed. In that case, consider creating your own project tracker. Excel and Google Sheets are great tools for tracking projects. Try creating rows for different tasks with columns containing key information like the due date, responsible party, the current status of the task, and any notes. You can get pretty complex here, using conditional formatting to change the task to red if the deadline has passed, and much more. However, it's far from necessary. Even a simple table tracking the basic information listed above is enough to help keep you on task and organized.

Project Brief Template

Basic Information	
Project Name	
Basic Overview	Very high level
Dates	- Project run date - Final due date - First deliverable
Project Stage	- Haven't started - Brainstorming/research - Drafting - Review - Final - Ran
Internal Stakeholders	Who else is involved in this project? Who's the point person? Who needs to review it?
Project Details	
Detailed Overview	What's the request?
Audience	Who's the project for? Is it internal, external-facing? Who will engage with the final product?
Platform	What format will the final product be in? Is it software-related? A project plan? Identify that here.
Project Goal	What's the end goal?
Specs	Include any specific details or criteria.
Concept	
Concepts	Outline concepts/ideas/brainstorming here. Consider if buy-in is needed at this point.
Brainstorm/Draft	Fill in more details here, draft the content, or simply use this as your workspace. Keeping the basic outline here will make it easy to keep track of everything.
Wireframe	If the project has a layout, consider outlining what you want it to look like ultimately.
Next Steps	

	Use this if there are any unique next steps or follow up items after the project wraps
Other links	
	Include any links to things here like other related project documents.