The **Ultimate Guide** to Project Management

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What you'll find in this guide

- Responsibilities of a project manager

- Setting up a new project

- Defining the project goal

- Defining scope

- Building a team

- Figuring out the action steps

- Estimating effort

- Creating a project plan

- Creating a budget plan

- Preparing for failure

- Delegating work

- Setting up a communication plan

- How to hold a kick-off meeting

Welcome, project manager!

Hi there!

Let me guess: You've been put in charge of a new project, and you wonder what to so it will be a success (and no big disappointment).

I created this Ultimate Guide as a helping hand … to give you the exact steps to take your project from idea to execution. Having managed dozens of complex projects myself I know what matters and what doesn't.

If you liked the guide, I'd love to hear from you! adrian@tacticalprojectmanager.com.

Make sure you regularly visit tacticalprojectmanager.com/blog because I publish new articles every week.

Good luck with your project!

-Adrian

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You probably want to know what is expected from you as a project manager. Let's take a look at the key responsibilities:

- **Setting up a project, incl. planning, staffing and budgeting:** Before work can start, you have to figure out what needs to be done and plan all activities, determine necessary skills, find suitable team members and estimate effort and cost.

- **Delegating work:** Assigning work to the people on your team

- **Managing the project:** This is your main job. It includes overseeing the work of everybody in your team, seeing if the project is moving forward (towards its goal) or if roadblocks are in the way.

- **Problem-solving:** Sooner or later, every project will run into problems. Then it's your job to work with your team towards a solution.

- **Making sure deadlines are met:** It's NOT enough to just assign work to people and then hope it will be completed on time. Regular follow up and being persistent is absolutely necessary!

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- **Overseeing the budget:** Of course, you have to ensure you don't run over budget.

- **Facilitate communication:** This is THE most important responsibility of a project manager! Making sure information is shared with the right people, and setting the frame to get people to talk to each other on a regular basis. There's nothing more dangerous to a project than information not "flowing" within the organization.

  How do you facilitate communication?
  - By organizing meetings / workshops
  - By sharing your ideas and concerns
  - By creating meeting minutes
  - By talking to your team on a regular basis

- **Reporting:** Unfortunately, we can't hide behind our computer screen forever without letting management know where we are in our project. Report the project status at least every 4 weeks in the form of a physical meeting.

Setting up a new project

Every project is launched following these steps:

- Defining the project goal

- Defining scope

- Setting up a team

- Figuring out the action steps / tasks

- Estimating effort for every activity

- Creating a project plan

- Creating a communication plan

- Holding a kick-off meeting

On the following pages I will walk you through each step.

Defining the project goal

The project goal is a short and clear summary of what the project is supposed to accomplish. The main purpose is to give direction and to set clear expectations for everyone in the project.

The goal definition should include:

- **the desired outcome** (what shall be achieved)

- **timeline target** (by when)

- **side conditions** (what to consider)

- **optional: business targets** (sales, profit, cost savings etc.)

Watch out:
Don't make THIS key mistake
when defining a project goal

An example of a project goal:

"Build a tunnel between Folkstone and Calais to support 200'000 cars daily without interfering with ferry traffic. The tunnel shall be completed by 2030."

Usually, the project goal is already set before the actual launch of a project. All you have to do in this case is to help with making it more clear and clarifying any doubts as to what is in scope and what isn't.

Defining scope

Scope is the sum of all the things a project is supposed to take care of. In project management lingo, we talk about something being "in scope" or "out of scope". If something is in scope it means the project has to take care of it. If it's not in scope, well, we can forget about it ☺. [Read my article about project scope](#).

It is very important to have a clear understanding of what is in scope and what is not, especially between the customer and the contractor. Scope determines the cost of the project as well as its duration.

If items get added to scope, project cost will increase and you will have to cram more work into the same amount of time.

Example 1: You are responsible for introducing a new IT system at your company. Does that including bringing data from the old to the new system? All historical data, or maybe just data from the past 2 years? And who will take care of it? The customer or the contractor?

Example 2: An engineering project has been charged to develop a new type of wind turbines. Under what wind conditions are the turbines expected to operate safely?

The best way to define scope is by creating a **scope statement**. This is a document which lists in detail which things are expected from the project and which side will take care of it.

Whatever is accomplished in a project, it is ultimately the people who make things happen: The analysts, engineers, designers, but also support functions like accounting or HR, who ensure that a project is sufficiently funded or staffed. **No role is unimportant. Everybody matters.**

Step 1: Find suitable people for each role
Based on the skills that are required in the project, see who you could get on the team. Don't pay attention only to hard skills though. Equally important (if not more important) are soft skills like reliability, communication skills and initiative.

Step 2: Build a great team
Once you have a team, the next step is to turn this diverse group of people into a great team. A team where people work so well together that hardly any steering is required from your side. A team that actually loves to work for the project and accepts to work overtime, if necessary.

Do you want to learn how to build a *great* team? Flip to the next page.

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The essence to building a great team is to **build trust**. Team members have to trust each other, and they have to trust you as the project manager. Building trust means to take away people's fears and doubts, and to give them the feeling that their contribution is highly valued.

What you can do to build trust:

- **Personal meeting:** At the beginning of your project, schedule a 1-hour meeting with each team member. During the first 30 minutes you talk about the project. During the other half hour you switch over to personal topics. Basically, you get the other person to talk about herself by asking questions like the following:

  - Where do you live?
  - How do you get to work every day?
  - What are your hobbies?
  - Do you have family?

- **Organize a team event:** You've probably been to such kind of an event. It can be a team dinner, going on a bike tour, visiting an adventure park or something of the kind. Activities like these help people to mix and build the bond that is so crucial for project success.

Watch our video on how to build trust

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Every project starts with the same one question: ***"What are all the things we need to take care of so that we are able to reach the project's goal?"***

You need to figure out what the pieces of the puzzle are before starting to assemble everything.

You want to know every task that needs to be carried out. Anything that needs to be set up, built, developed, tested, decided or agreed upon. Figure out what it is, how long it is going to take, who will take care of it and how it relates to the other activities in the project.

Examples of tasks:

- **Creating a specification**

- **Writing software**

- **Testing a software**

- **Booking accomodation**

How do you find out about all this?

That's what I'll show you on the next page.

The best way to figure out the steps (or activities) in a project is by talking to people:

- Schedule a 1:1 meeting with each person on your project (1-2 hrs).

- Give an overview of the project including its goal and any side conditions or assumptions. It helps if you have something to show, like a PowerPoint about the project.

- Ask questions to figure out details for every task. Your focus must be to understand what the task is about, how long it will take to complete, the sequence in which task must be performed.

Examples of good questions to ask:
- *"What needs to be done from your side to get the servers set up?"*
- *"How long do you think this will take?"*
- *"Do I need to involve anybody else besides you?"*
- *"Once you have completed the servers, can we get our software installed right away?"*

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Estimating effort

While you gather the tasks to be performed, you also have to take care of another – often disliked – job. It is to estimate the effort and duration for each piece of work.

Again, the way to get estimations is to ask the experts who are responsible for carrying out the work (or those who have done it before).

In the end you want a number behind each task:

"Develop of user interface effort: 10 days."

Note that effort and duration of a task may not be the same, because you have to account for weekends, bank holidays and time needed for reconciliation between different work streams (activities).

I want you to understand that there is no such thing as "accurate estimates". You are always *guessing*, and you' ll never be 100% right.
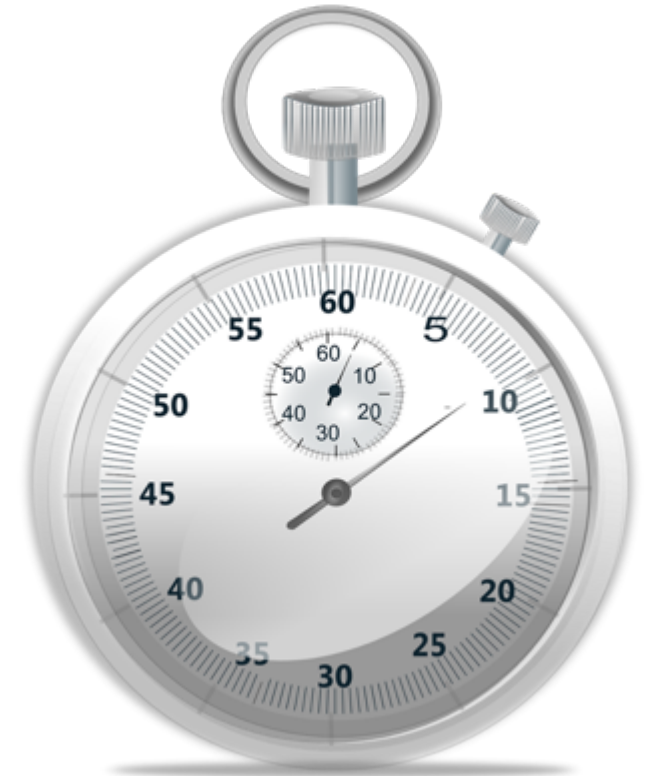
Make a rough estimation and plan in some buffer to account for uncertainty.

Once you have a list of the activities that have to be carried out including effort, it is time to create a project plan.

There's only one reason why we create a project plan: We want to visualize the project and make it comprehensible. We want to see right on the spot where we are in the project, what activities follow next, and how all jobs relate to each other.

That said, don't make the mistake of adding too much detail. When you have several tasks that belong together, it is helpful to group those tasks into one overarching task.

Year		2012							2013																
Month		NOVEMBER				DECEMBER				JANUARY				FEBRUARY				MARCH				APRIL			
Week		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Activity																									
Thesis Proposal			███	███	███	███	███																		
Software Development										███	███	███	███	███	███	███	███	███							

On the next slide I'll show you how to actually go about setting up the plan.

Planning is usually done backwards, because project end dates are often already set. This means you start with the last day and keep adding task after task in the appropriate sequence until arrive at the start.

To draw the plan, follow these steps:

[Download my Excel project plan template here](#)

1. Pick a task from your list **(e.g. "software implementation")**

2. Check the effort for this task **(e.g. 10 days)**

3. Open the Outlook calendar (or any other calendar) and jump to the week the task should be scheduled at. What you want to find out is if there are any bank holidays or other days on which no work is possible.
   A conclusion could be: "The task takes 10 days to complete, which would be 2 weeks. Since Tuesday is a bank holiday here, I have to add one more day."

4. Next, check with the person responsible for the task if she is on holiday during that time.

5. Draw a bar in your plan, with the bar's width representing the duration of the task.

6. Repeat step 1-5 until you are at the start.
   The end result will look somewhat like the image on the right.

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Preparing for failure

The best advice I got from my mentors was this one: Whenever you start a new project, ask yourself the question: "**What could go wrong here?**". The idea is to take a close look at all the risks a project could be facing, and to be prepared for those risks by implementing smart measures.

To make this strategy more clear, let's use an analogy from traveling. Whenever you travel, there are a few things that might go wrong:

- You might miss your plane

- Your flight may be delayed

- Your suitcase might get lost

You've probably experienced all of those issues yourself. That's why you know how to prepare for your next journey: You leave the house 2 hours earlier so that even heavy traffic cannot jeopardize your travel plans. For flight delays, you might take an earlier flight or you might schedule a meeting late so that even after a late arrival you'll still make it to the meeting on time. What about lost luggage? You don't have full control over that, but you can still limit the negative consequences (like I do): I always carry a set of clothes in my cabin luggage.

Preparing for failure

Taking the flight analogy from the last slide to project management, you can (and should) adapt the principle of "being prepared for the worst" in your project. Why is it so useful? It gives you focus, because once you know what the problematic areas in the project are, you can take care of them and make sure that small issues don't turn into huge crises.

Typical risks in projects are:

- Failure to understand the customer requirements

- Delay of activities

- Resource bottlenecks

- Technical issues

Conduct a risk assessment for your project (read how a risk assessment is done)
1. Open a blank Excel sheet and list all the risks you see (also ask your team for feedback)
2. Identify the top 5 risks (biggest negative impact and high chance of happening)
3. Define at least one mitigating action for each risk (and define responsible)

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If there is one thing I want you to take away from this guide, it would be this one: **Your most important job as a project manager is to make communication happen**. Communication is the all-cure in every project.

Why is that? Think of a project as a complex network of inter-dependent activities. Whatever one team does (e.g. write a concept) has implications for another team (e.g. the developer or the end-user). If these people don't talk to each other, this will lead to misunderstandings, which again can lead to delays.

The best way how you can ensure communication is to set up a communication plan right from the start.

This is basically a plan which states how often and when the different work streams in a project are supposed to meet for discussing current topics.

I don't want to give you just the theory. Here's [an actual communication plan](#):

name of meeting or update	participants	purpose	frequency	type
project manager status meeting	customer and contractor project manager	review status of deliverables, alignment, project planning	weekly	physical meeting
project team meeting – core team	project manager, core project team	status update, alignment	weekly	physical meeting
project team meeting – extended team	project manager, extended project team (including infrastructure, security and migration)	status update, alignment	monthly	physical meeting
steering board meeting	steering board members	status update, decision-making on major topics, approval of extra budget	monthly	physical meeting
escalation meeting	depends on issue	alignment, resolve issues	ad hoc	physical meeting
company-wide project status update	management level L1 and above	information	monthly	email update

Share the communication plan within your team (and within your organization) once it's ready.

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As a project manager, you can't do all the work yourself. In fact, you shouldn't be doing anything else but ONE thing: **leading the project**. I'll get to that on the next slide.

For getting the "real" work done, you have a team of people. Your job is to assign the work to the right people and to make sure it gets done – not just done, but within the agreed timeframe!

If this is your first project, you may feel uncomfortable asking other people to do work for you. Trust me: this is just very normal. You will become more confident over time.

When delegating work, stick to the following rules:
- Describe the task in a very clear way
- Make sure your request doesn't sound optional. Don't say *"Could you please do X …. if you have time?"*
  Rather, say: *"Can you please do X by <DATE> and let me know by email when you're done."*
- Ask the person if she has understood what is expected from her
- Also, summarize the task in a short email so both both you and your team member can refer to it later on (never rely on verbal requests only).

Whatever work you delegate, you need to keep track of it. Otherwise, it will get forgotten and you'll have a bad awakening when there's some urgent job that wasn't done.

A simple to-do list in Excel will do the job. You can find my template here:
https://www.tacticalprojectmanager.com/templates/

No	Phase	Process	Entered by	Task	Responsible	Due date	Completed on	Status
1	Preparation phase	Project Management	Jack	Organize Kick-off meeting	Project Manager	31.10.2017		open
2	Preparation phase	Project Management	Jack	Find suitable conference room	Project Manager	05.10.2017		open
3	Preparation phase	Project Management	Felicia	Prepare kick-off presentation	Project Manager	17.10.2017		in work
4	Preparation phase	Accounting	Jack	Name project resource	John Smith	15.10.2017		done
5	Preparation phase	Logistics	Jack	Name project resource	Marc Bellamy	15.10.2017		in work
6	Preparation phase	Materials Mgt.	Jack	Name project resource	Heather Stone	15.10.2017		in work
7	Preparation phase	Project Management	Jack	Finish communication plan	Project Manager	31.10.2017		open

What you do is go through your task list once a day to see if any deliverables are due, or have become overdue, and then check with the person in charge if the task has been completed.

What should you do if something is overdue? There may be good reasons for this (e.g. person has fallen ill), but if there's no valid reason for the delay you need to go into a pushy mode - by speaking to the person as well as sending email reminders. **Remember that it's your responsibility to ensure work gets done on time.**

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Conducting a kick-off meeting

Once you have completed the initial project setup (a project goal, a team of people and an agreed project schedule), it is time to take the last step, which is to [present the project in a kick-off meeting](#).

The purpose of a kick-off meeting is to get everyone on the same page, but it's also an opportunity for people to get to know each other.

The agenda of a kick-off usually looks like this:

- Introduction

- Project goal

- Project organization

- Project schedule

- Responsibilities

- Q & A

That's it! Here's what you should do now

1   If you liked the guide, send it to **one** of your friends or coworkers.

2   Connect [with me](#) on LinkedIn

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