PROJECT MANAGEMENT
BOOK OF LISTS

Project Management Book of Lists
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Numerous authors

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For additional information on requests for translations, please contact TenStep, Inc. directly 877-536-8434 or 770-795-9097, email admin@tenstep.com, or visit http://www.tenstep.com.

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Initiate the Project

Three Ways to Manage Projects Step-by-Step

You have a choice in how you manage projects. If you manage in an *unstructured* fashion, then much of your time will be spent fire fighting and trying to control the project scope. This is known as "project chaos".

Instead, if you manage in a more structured *step-by-step* fashion, then you can control the project delivery and ensure it proceeds according to plan. So here's how to do it...

1. **Define the Project Roadmap**

At the start of the project you need to define the *Roadmap*. This is a diagram that shows the major steps that need to be taken to deliver the project from start to finish. Another name for this is the "Project Life Cycle". Every step is clearly defined and the steps are placed in a logical order, from Project Initiation to Project Closure.

After creating your Project Roadmap, get buy-in from your Project Sponsor and then clearly communicate the steps to your team. That way, everyone knows what has to be done to deliver the project, from start to finish.

2. **Base your Plan on your Roadmap**

If you haven't done so already, create a detailed Project Plan that lists all of the tasks needed to complete the steps in your Roadmap. If you have already created your plan, then review it to ensure that all of the roadmap steps are listed in your plan and that your plan is perfectly aligned with your Roadmap.

That way, by following the steps listed in your plan you can ensure that you follow the roadmap and never deviate off track. You can then avoid lengthy delays and costly overruns, which are common with projects.

3. **Use your Roadmap to Keep Control**

Print your Roadmap out and put it in a visible place so that your team can see it. Every time a change is raised, refer back to your roadmap to determine whether it should really be implemented.

By constantly referring to your Step-by-Step Roadmap, you can easily identify the impact of changes, risks and issues on the project. And you can see at a glance whether they are going to impact on your ability to deliver your project on time.

A clear step-by-step roadmap helps you make decisions on the fly, while still remaining focused on the end objective. And you can use it to report on your project progress to your project sponsors. It also helps you show your team the progress of your project to date to boost motivation and morale.

So take the first steps by getting your team together and creating a Project Roadmap which lists the major steps that need to be completed to deliver your project. Then plan your project based on your roadmap, print it out and stick to it. By doing this, you'll help your team remain focused on the tasks at hand and improve productivity.

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The MPMM Methodology (www.MPMM.com) and TenStep Methodology (www.TenStepPM.com) include a complete Roadmap for projects to help you get started. Every step in the roadmap is defined in depth, so you know what has to be done and when, to deliver projects from start to finish.

Three Steps to Prioritize Projects

Why should you prioritize your projects - don't they all have to be delivered on time and within budget? Yes, but any smart Project Manager will recognize that they only have limited time, resources and budget available to do it. So they need to set priorities, to ensure that their most important projects don't run out of time, people or money when they need them.

So here are 3 steps to help you prioritize projects quickly and easily...

Step 1: Define your Criteria

The first step is to define your criteria for ranking one project over another. And the best criteria for determining project priority are the fit between your project and the overall business strategy. If one project is taken to achieve a critical part of your business strategy, then it may be marked as a higher priority than one that's not related to the business strategy at all.

If you have no clear business strategy from which to prioritize, then use other factors, such as the: level of project risk, the amount of resource consumed, the extent to which other projects are dependent on this one, or simply the likelihood of success.

Step 2: Match your Projects

With a clear set of criteria defined, the next step is to match your projects against those criteria. You will need to identify the extent to which each project matches the criteria set out, and identify any gaps.

This is the most important step, as projects that you thought would be a perfect fit against your criteria may not end up being so. And projects that you didn't think were that important may end up meeting many of the criteria and therefore be marked as high priority.

Note: Make sure that your personal preferences don't influence the exercise. It's easy to make the "fun" projects the ones that receive all of the priority. Unless they are critical to the business, they should always be the "icing on the cake". It's often the more mundane projects that are critical to the strategy for the business.

Step 3: Define the Priorities

Ok, so you now have a list of projects that are each ranked according to their fit with your criteria. You now need to define their priorities.

We suggest you keep it simple. Group them into A, B and C (with A being "high priority", B "moderate priority" and C "low priority"). Decide now how you are going to manage each priority grouping differently. You may decide for instance, to spend more time on your "Group A" projects than your Groups B & C. You might drive them harder than the rest, report on them at a more detailed level than the rest and always allocate spare resource to them, over the rest.

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And there you have it. By taking these 3 steps, you'll prioritize projects faster and more efficiently than before, boosting your chances of delivering your high priority projects on time and under budget.

Three Steps to Improve your Project Processes

Everybody talks about them, but what are they? Project Management Processes are defined by MPMM (www.MPMM.com) as "the methods taken to complete a project". Put simply, they are the sets of activities that a Project Manager completes to initiate, plan, execute and close projects.

Of course, most Project Managers use their own processes to manage a project - but these processes need to be continually refined, to ensure that every project is delivered on time and within budget.

So to get the most out of your project delivery, we've listed below the steps you need to take to continually review and refine your project management processes.

Step 1: Identify Your Processes

The first step to take is to review your current project processes and determine whether they're operating efficiently, by answering the following types of questions:

- Which processes do I have in place to manage my projects?

- Do these processes result in the desired outcome, every time?

- Who manages these processes, have any issues been identified?

- Are my processes operating efficiently, without hassle?

- Can I identify any weaknesses or areas for improvement?

Ideally, each process should result in the desired project outcome every time, without hassle. If you're not achieving this, then you will want to implement a suite of improvements to perfect them.

Step 2: Identify Process Improvements

With a clear understanding of the state of your current project processes, the next step is to identify any areas for improvement. The easiest way to do this is to compare your processes against a project management best practice or standard. Here is one way to do it:

List your processes and rank them in terms of efficiency

Clearly mark the processes which require improvement

Compare those processes against the processes defined in the best practice project management methodology MPMM

List the differences between your and MPMM's processes and identify a new approach based on the comparison made.

By comparing your current processes against a best practice methodology such as MPMM, you can easily identify the areas for improvement.

Here are some examples of best practice project management processes:

- Time Management Process

- Cost Management Process

- Quality Management Process

- Change Management Process

- Risk Management Process

- Issue Management Process

- Procurement Process

- Acceptance Process

- Communications Process

Step 3: Implement Process Improvements

Now that you have identified the process improvements, you will want to carefully think about how to implement them. You'll need to:

- Prioritize your improvements based on the intended benefits

- Schedule the improvements based on the status of your projects

- Communicate the improvements to your project team

- Implement the improvements according to your schedule

- Measure the improvements to see if they've had the desired effect

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Performing process improvement is not as easy as you might think. It takes time, diligence and patience to implement process improvements which help you to manage projects successfully every time.

Top Project Managers continuously review their processes, to make sure that their projects are completed as quickly and efficiently as possible. Regardless of your current level of experience and knowledge, you will gain substantial benefit from performing continuous process improvement. It will certainly help you to achieve project management success.

Four Steps to Creating a Project Business Case

The purpose of a Business Case is to justify the project expenditure by identifying the business benefits you're going to deliver. Here's how to create a Business Case in 4 simple steps:

Indentify the Business Problem	→	Identify the Alternative Solutions	→	Recommend a Preferred Solution	→	Describe the Implementation Approach
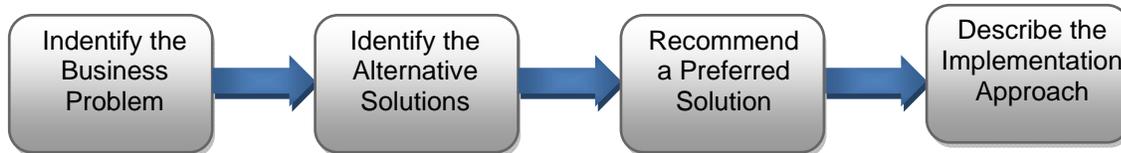
Step 1: Identify the Business Problem

Usually, projects are taken to solve a particular business problem or opportunity. So you need to investigate that business problem or opportunity and describe what it is, how it's come about and the timeframes in which it needs to be addressed. Only with this knowledge, will you truly understand the purpose of the project and the timeframes for delivery. Without this knowledge, it's like building a house without a solid foundation.

Step 2: Identify the Alternative Solutions

Now that you understand the business problem/opportunity in depth, it's time to identify a solution to address it. To ensure that you choose the right solution, take these steps:

- Identify the alternative solutions

- Quantify the benefits of implementing each solution

- Forecast the costs of implementing each solution

- Assess the feasibility of implementing each solution

- Identify the risks and issues associated with each solution

- Document all of this, in your Business Case

Step 3: Recommend a Preferred Solution

Before you rank the solutions, set out the criteria for ranking them and choose a scoring mechanism as well. For instance, you may decide to:

- Score each solution from 1-10, based on their costs and benefits

- Weight each based on criteria which are important to you

- Use a more complicated scoring mechanism

Then go ahead and score your solutions to identify the best solution. Make sure you document the entire process in your Business Case.

Step 4: Describe the Implementation Approach

By now, you have selected a solution and you have confirmed its benefits and costs. The next step is to convince your Project Sponsors that you have thought through the approach for implementing it. So document the steps you're going to take to build the solution for your client. Remember, only with a clearly defined Business Case will you ensure you deliver the business benefits expected by your customer.

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And that is your four steps to creating a project business case that will benefit your delivery.

Five Steps to Delivering Your Projects

On a project, it is easy to get bogged down with the details and forget about the "helicopter view". You need to take these 5 steps...

Step 1: Define the Goal

Start by setting goals for the project. Sounds easy —but have you actually documented the end goal for your project? Have you specified the objectives, scope and deliverables in a Project Charter?

A Project Charter is like an *architectural drawing* for a building project. It tells the builder what the end result is going to look like, so the client knows what they will receive and the Project Manager knows what has to be delivered and by when.

It helps you to direct your team towards the end goal, so everyone is on the same page.

Step 2: Plan the Roadmap

With your end goal defined, the next step is to create a project plan that sets out the path ahead. List all of the phases, activities and tasks for the entire project.

Include delivery milestones and make sure that the right people are allocated to the right tasks so that everyone knows what they are responsible for.

With a concrete plan ahead, you can feel confident about delivering within the timeframe set. Without a concrete plan, no one knows what has to be done and by when, leading to chaos and mayhem (i.e. the usual project environment)!

Step 3: Manage Time Spent

Once you've communicated the plan, you then need to ensure that everyone is working on the *planned* tasks and not tasks *unrelated* to the end goal. It's so easy to go off-track on projects because you have lots to do and such little time.

Use timesheets to help your team track time spent. If your team spends more time than that assigned and the task is still not complete, then you will need to investigate why this has occurred and resolve the problems quickly.

Step 4: Keep a Helicopter View

To accurately monitor and report on the project at a helicopter level, you need a crystal clear picture of the project delivery against schedule.

You need to know for every task in your project plan, whether it is under / on / over schedule. Only with this detailed knowledge can you control the status of the project and fix problems when they occur, to keep your project on track.

Step 5: Going "Belly Up"

So you've done all this but your project is going belly up (i.e. slipping). What then? Well the first step is to investigate the reasons *why*. It may be that the scope of the project has grown from that originally agreed, or you have encountered complexities that were not identified when you started, or that the plan was too aggressive in the first place.

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Regardless, you need to 1) Stop 2) Investigate 3) Resolve 4) Report. You may need to redefine the scope of the project, hire additional resources to help out, or agree with the customer on a new delivery date.

Five Tips 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.

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

Five Steps to Build a Business Case for Your Project

All projects are done within the confines of a business need. Even non-profit organizations need to justify the reason why a project is being taken and how resources will be expended against the project. The following five steps will equip you with the information you need in order to create such a business case.

Step 1: Determine the Source and Motivation behind the Project

The first question you need to answer when it comes to creating a business case for your project is who is behind this project? You need to have a clear understanding of why this project is being taken and who will be receiving value from the completion and implementation of the project.

For example, it may be a no-brainer that the source of the project comes from a salesperson who just sold a million dollar deal to one of your largest clients. The motivation is to get the project underway and complete so the company can be paid for their services. However, there may be projects that are less straight-forward. Perhaps the source and motivation behind a particular project is to further a particular executive's career by completing one of their "pet projects". It's important to know if this so you know what you may be up against as the project moves forward.

Step 2: Define How the Project Fits into Your Company's Strategic Objectives

Every company should have a handful of strategic initiatives that help move the company forward. Examples of these may be that the company wants to move into a new market, release a new product, or introduce new and ground-breaking technology. It's much easier to justify the existence of a project if you can attach this project to one of those strategic objectives.

What if your company doesn't have a set of strategic objectives they are looking to accomplish? You can use the default objective every company has and that is to stay in business. In order to stay in business every company must increase revenues and decrease (or at the very least, control) costs. You can show how this particular project will help accomplish either one of these goals in order to keep it in a much more favorable light.

By the way, management will appreciate the fact that you are looking at the projects you are managing through this strategic lens. It lets them know you are concerned about a much bigger picture and not solely focused on the details.

Step 3: Calculate the Return on Investment (ROI)

The ROI this project will generate is a critically important part of establishing a business case. On a personal level, you want to know if you put money into an investment that it will provide a certain percentage return. The goal is to not sink funds into something and lose money. The same principle applies (even more so) on a corporate level. Executives want to know that if they invest [x] in this project that they will receive [y] in return.

Defining ROI can take on a number of different forms. It may be dollars that are invested, manpower, or even opportunity costs that are incurred because of not working on some other project. Regardless of what it is that it will take to complete this project, it can always be tied back to money. Then, you can determine how the return on the project is calculated. Is it a particular metric, less hours spent, or higher profits? This too can be translated into financial numbers that make sense at the executive level to give the go ahead on the project.

Step 4: Show How Similar Projects Have Done in the Past

A real estate agent will pull comp sales of houses that are similar to yours in your area when they want to determine the value of your home. The reasoning is that if a particular house sold for a certain amount then this house should sell for something close to that amount. It's the same thing with a project that you are trying to get off the ground by putting a compelling business case together. Providing the details of similar projects such as how long they took, how much they cost, what impact they had on the bottom line, and other relevant details can instill confidence that this project will do the same.

What do you after following these four steps when it comes to putting a business case together? You have a clear definition of the project and motivation behind it, you know how it supports the company's strategic initiatives, a calculation of how much the company will make off such an investment, and a level of confidence that it can be accomplished.

Here's the icing on the cake that occurs after the business case has been accepted.

Step 5: Monitor and Report on Results

You can now monitor and report on results once the project is underway and ultimately complete. This is your opportunity to show how the assessments, estimates, and calculations that were in the business case came true. Why would you do this? To make your job in putting together a business case that much easier next time. If you gain the reputation of being able to derive business value time and again with the projects you manage then your projects will be the first ones that will be cleared for takeoff!

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Have no fear the next time you are asked to put together a Business Case for a project. Apply common sense to your Business Case Document and you'll see how much easier it is to get your projects green-lighted.

There's no need to start from scratch when it comes to putting a Business Case together.

Five Steps to Completing a Feasibility Study

A Feasibility Study needs to be completed as early in the Project Life Cycle as possible. The best time to complete it is when you have identified a range of different alternative solutions and you need to know which solution is the most feasible to implement. Here's how to do it...

Step 1: Research the Business Drivers

In most cases, your project is being driven by a problem in the business. These problems are called "business drivers" and you need to have a clear understanding of what they are, as part of your Feasibility Study.

For instance, the business driver might be that an IT system is outdated and is causing customer complaints, or that two businesses need to merge because of an acquisition. Regardless of the business driver, you need to get to the bottom of it so you fully understand the reasons why the project has been kicked off.

Find out why the business driver is important to the business, and why it's critical that the project delivers a solution to it within a specified timeframe. Then find out what the impact will be to the business, if the project slips.

Step 2: Confirm the Alternative Solutions

Now you have a clear understanding of the business problem that the project addresses, you need to understand the alternative solutions available.

If it's an IT system that is outdated, then your alternative solutions might include redeveloping the existing system, replacing it or merging it with another system.

Only with a clear understanding of the alternative solutions to the business problem, can you progress with the Feasibility Study.

Step 3: Determine the Feasibility

You now need to identify the feasibility of each solution. The question to ask of each alternative solution is "can we deliver it on time and under budget?"

To answer this question, you need to use a variety of methods to assess the feasibility of each solution. Here are some examples of ways you can assess feasibility:

- **Research:** Perform online research to see if other companies have implemented the same solutions and how they got on.
- **Prototyping:** Identify the part of the solution that has the highest risk, and then build a sample of it to see if it's possible to create.
- **Time-boxing:** Complete some of the tasks in your project plan and measure how long it took vs. planned. If you delivered it on time, then you know that your planning is quite accurate.

Step 4: Choose a Preferred Solution

With the feasibility of each alternative solution known, the next step is to select a preferred solution to be delivered by your project. Choose the solution that; is most feasible to implement, has the lowest risk, and you have the highest confidence of delivering.

You've now chosen a solution to a known business problem, and you have a high degree of confidence that you can deliver that solution on time and under budget, as part of the project.

Step 5: Complete the Solution

It's now time to take your chosen solution and reassess its feasibility at a lower level. List all of the tasks that are needed to complete the solution. Then run those tasks by your team to see how long they think it will take to complete them. Add all of the tasks and timeframes to a project plan to see if you can do it all within the project deadline. Then ask your team to identify the highest risk tasks and get them to investigate them further to check that they are achievable. Use the techniques in Step 3 to give you a very high degree of confidence that it's practically achievable. Then document all of the results in a Feasibility Study report.

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After completing these 5 steps, get your Feasibility Study approved by your manager so that everyone in the project team has a high degree of confidence that the project can deliver successfully.

Five Steps to Start New Projects

Every time you're given a new project, take these steps to ensure you're on the right track from the outset:

1. **Take Responsibility:** Before you agree to take on the responsibility of managing a project, make sure there is adequate sponsorship, and that you have adequate funding and resources to complete it on time. Your gut feel should be that the project is achievable and that whatever happens, you'll have the full support of your Sponsor through the project. If it's not feasible or you lack support, then solve these two problems first, before you start out.

2. **Clarify the Scope:** Great, so you've agreed to take responsibility. The next step is to review the scope of the project to ensure that all of the deliverables to be produced during the project are adequately defined. You don't want to get part way through the project only to find that your customer actually wanted additional deliverables that weren't planned.

   So sit down with your customer and clarify all of the deliverables on day one. The complete set of deliverables forms the "scope" of the project and it's critical that you document these in as much depth as you can, before you get started.

3. **Agree on The Deadline:** A "Project" is an activity which must be delivered by a specified date. That date is usually called the project "Deadline". You need to agree the deadline with your customer, and it must be feasible to achieve.

   Rather than agreeing on a fixed date, instead try and agree on a fixed timeframe for delivery. Set an "ideal delivery date" and a "last delivery date". Make the *ideal delivery date* achievable. That way, the last resort date, which may be a week, month or more later on gives you the contingency you need in case the project is delayed.

4. **Set Priorities:** Now that you have an approved set of deliverables, scope and deadline, you need to set the project priorities. Do this by showing your customer the complete list of deliverables to be produced, and ask them "if for whatever reason, we couldn't complete all of the deliverables on time then which could be done after the deadline, if any?" Push as hard as you can to get them to agree that some deliverables can be produced after the deadline if need be, because it gives you extra contingency for when you need it. Then ask your customer to prioritize the list of deliverables from highest to lowest so that you can align these priorities with the tasks in your plan.

5. **Understand the Drivers:** You really need to understand as much as possible about your customer's business to know why the deadline, scope and priorities have been set as they have. Ask your customer what's driving the deadline, why you can't reduce the scope further and why the deliverables have been prioritized as they have. It's critical that you understand the answers to these questions before you start out, so that you satisfy their requirements in full.

   Also, document these conversations with your customer and get them to formally approve them. That way, you have a formal agreement of the scope, deadline, priorities and drivers at the outset.

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To help you do this, download the Project Management Kit of templates from Method123 (www.Method123.com) and the Template Collective (www.TemplateCollective.com). They help you document the scope, priorities and business drivers, and then create plans for delivering projects on time. They also include real-life practical examples to save you time.

Five Areas to Get Off to a Good Start

Step 1: Get the Vision

The first thing you need to do is to sit down with your Project Sponsor and agree on what needs to be delivered and by when. You need a hard and fast project end date. You need to understand why this end date is important to the business and the impact if you go past it. Only then, will you have a solid stake in the ground, against which you can measure progress.

Step 2: Hire the Best

Great teams deliver great projects. So it's critical that you hire the best people you can afford to bring on board. Try and "borrow" experts from within the business, and "beg" your Sponsor for more cash to recruit the best in the market. Don't fall for lesser skilled people that you can find more easily. It always takes time to find top people, but they will deliver better results in a faster period of time. And they will be easy to manage!

To hire the best, make sure you've clearly specified the roles first. Then advertise the roles widely within and outside the organization. Keep the initial interviews short (30 minutes) and interview as many people as possible. Put less than 5 people through to a second interview and only 2 on your shortlist, before selecting your final candidate.

Step 3: Set the Scope

With a great team and a clear delivery date, the next step is to define what it is that the project has to deliver. This is called the "project scope" and it needs to be documented in depth!

List every project deliverable and describe it in as much detail as possible. You need to work closely with your customer (or the business) with this, because the deliverables need to meet their requirements and deliver the stated business benefits.

Step 4: Determine if it's Feasible

Now you need to know if you can produce the deliverables with the timeframe and resource available. In short, you need to know if the project is "feasible" or not.

To determine this, you need to work out how long each deliverable will take to produce and how much resource is required to produce it. You then need to add up all of the timeframes and all of the resource hours and check that they fit in with your resource budget and project delivery date. If they don't, then you have 3 options: Get more time, find more resource or reduce the scope of the project. It's that simple!

Step 5: Take Control and run with it

If your project passes the feasibility test, then you're ready to go! You need to plan your project and manage it day-to-day.

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These five steps should get you off to a start that will lead to success.

Five Signs to Deliver Challenging Projects

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

1. **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. Use these project management templates to save you time and effort completing project tasks.

2. **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.

3. **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 assigned 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".

4. **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.

5. **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.

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

Eight Golden Rules to Starting New Projects

When you start a new project, you need to follow these eight "golden rules" to ensure its success...

1. *Sponsorship:* You need to have a highly motivated sponsor who understands the criticality of the project on the business and is motivated to making it a success. They need to have the resources available to support you, and the right level of "influence" in the business.

2. *Targets:* Sit down with your sponsor and agree specific targets. Make sure they are realistic. Perform a feasibility study to ensure that what is discussed is feasible to achieve. Only agree to the targets if there is sufficient contingency. Add an extra 20% to the budget and timeline if you can.

3. *Scope:* Keep your scope to a minimum. If you can't get the contingency you need, then try and negotiate to deliver less than you have to. And if that doesn't work, identify any deliverables that are not on the critical path and negotiate to produce these items after the project deadline has been reached.

4. *Resourcing:* Find the best people you can afford. Then find extra people to assist, as further contingency. You will always need more people than you plan for, so you need to identify additional help as a "backup" should you need it. This could include people from other teams in your business, contractors or suppliers.

5. *Planning:* Your success will be measured against your ability to deliver against the plan. So plan wisely. Only plan in detail the next few months. After that, plan at a summary level. Never "over-plan" by listing every tiny task for the entire length of the project, as people will hold you to it. Then, stick to the plan.

6. *Processes:* Implement processes for managing time, cost, quality, change, risks and issues upfront. MPMM (www.MPMM.com) and the TenStep Methodology (www.TenStepPM.com) contain all of the processes you need. Communicate these processes to your entire team and make sure that everyone follows them rigorously.

7. *Tracking:* With your plan complete, you need to start tracking progress against it. Track your progress against budget and schedule. Track your risks and issues. Track your work efficiency and your overall percent complete.

8. *Reporting:* Report on your project status weekly. Keep your reports brief and 100% accurate. Report the summary level to your Sponsor and the detailed level to your team. Focus on the current issues to hand. Remember that your project report can be a great motivational tool to rally everyone behind the project and focus them on the outcome.

With these eight golden rules and the whole team motivated to achieve the goals, you have the best chance of success.

Nine Processes Needed to Properly Execute a Project

The Project Execution phase is the phase within which the deliverables are physically constructed and presented to the customer for acceptance. While the project team is producing the deliverables, the Project Manager should implement the following management processes to monitor and control the activities being taken:

1. Time Management (recording time spent against the project)

2. Cost Management (keeping track of project expenditure)

3. Quality Management (assuring and controlling the quality of deliverables)

4. Change Management (managing changes to scope, deliverables and timescales)

5. Risk Management (identifying, quantifying and mitigating potential project risks)

6. Issue Management (documenting and resolving project issues)

7. Procurement Management (sourcing of products and services from external suppliers)

8. Acceptance Management (gaining customer acceptance of project deliverables)

9. Communications Management (distributing communications within the project)

These processes will form the foundation for properly executing the project.

Ten Reasons Why Projects Fail

1. Insufficient Resources

The Project Manager was given insufficient resources and budget at the start of the project. If you don't have the level of resources or budget you need, then tell your Project Sponsor quickly.

2. Impossible Deadlines

The deadline for the project was always impossible to achieve. The Project Manager should have told the sponsor at the start of the project and fought to have the deadline extended. You not only need to have sufficient time to deliver your project, but you also need contingency in case things take longer than expected.

3. Poor Communication

The Project Manager fails to communicate the status of the project to the team and sponsor. So everyone thinks the project is going smoothly until the deadline is missed. You need to tell people early if it's slipping. Don't hide it. By telling people you're running late, you give them the opportunity to help get it back on track.

4. Lack of Focus

The team doesn't really know what is expected of them, so they lack focus. They are given a job to do but not told what is required and by when. Everyone in your team should have regular goals to meet, they should have deadlines and you should be monitoring their progress at every step in the journey.

5. Low Morale

The project team lack motivation, so nothing is delivered on time. If you want someone to deliver within a set timeframe, then you need to motivate them to do it through reward and recognition. And you need to be highly motivated yourself. Only by being healthy, relaxed and truly motivated can you inspire others to be.

6. Sponsor Support

The Project Manager gets very little support from their sponsor. There is no-one available to help solve problems or provide further resource or money when it's needed. If you lack sponsor support, then you need to tell your Project Sponsor about it. Be open and frank with them. Tell them what you need and by when.

7. Scope Creep

The scope of the project keeps changing, so you never really have a fixed set of deliverables. Every time it changes, you lose time and resource, so Change Control is critical. The scope needs to be clearly defined and then a process put in place to ensure that change requests are formally approved.

8. Lengthy Timeframes

The project timescale may simply be too long. Over time your customer's requirements will change, so you need to break your project into smaller chunks and deliver each as a project on its own.

9. Lack of Tools

Not having the right tools to get the job done can also be a problem. Using good quality tools such as templates, processes and a project methodology will lead to project success.

10. Lack of Customer Involvement

Lack of customer involvement has proved fatal on many projects. You need to involve your customer throughout the project to ensure that what you are building will meet their requirements. Remember, only if your customer is truly satisfied will your project is a success.

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Know these reasons why projects fail should prevent failure from happening.

Define and Plan the Project

Three Easy Steps to Create a Project Plan

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 three critical steps involved in creating a Project Plan:

Define the Work Breakdown Structure → Identify the Required Resources → Construct a Project Schedule

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 complete 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 complete 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 taken 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 complete 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

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

Four 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...

1. **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:

- Define the project goals, timeline and schedule

- Quantify the amount of resource you need

- Specify the project scope and deliverables

- Decide if you need to outsource to a supplier

- Recruit your team and set up a project office

2. **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:

- Identify the number of resources you need

- Set a budget and plan your expenditure

- List the deliverables and set quality targets

- Plan your communications so everyone is informed

- Decide how you are going to manage risks, changes and issues

3. **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:

- Record time spent by your team completing tasks

- Frequently check your actual vs. planned progress

- If you start falling behind, take action or get help

- Resolve risks, issues and changes quickly

- Keep your team motivated by rewarding good performance

4. **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.

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Take the time to identify your lessons learned, as these will be invaluable to your next project.

Four Steps to Createa Project Charter

The Project Charter describes the project vision, objectives, scope, organization and implementation plan. It helps you to set the direction for the project and gain buy in from your stakeholders as to how the project will be organized and implemented. It will also help you to control the scope of your project, by defining exactly what it is that you have to achieve. To define a Project Charter, take these steps:

Step 1: Identify the Project Vision

- **Vision:** The first step taken when defining a Project Charter is to identify the project vision. The vision encapsulates the purpose of the project and is the defined end goal for the project team.

- **Objectives:** Then based on the vision, list three to five objectives to be achieved by the project. Each objective should be Specific, Measurable, Achievable, Realistic and Time-bound (SMART).

- **Scope:** With a clear view of the Vision and Objectives of the project, it's time to define the project scope. The scope defines the formal boundaries of the project by describing how the business will be changed or altered by the project delivery. Deliverables: Then you need to describe each of the deliverables that the project will produce.

Step 2: Describe the Project Organization

The next step is to identify how the project will be structured by listing the customers, stakeholders, roles, responsibilities and reporting lines.

- **Customers:** First, identify the project customers. A *customer* is a person or entity that is responsible for accepting the deliverables when the project is complete.

- **Stakeholders:** Then identify the project stakeholders. A *stakeholder* is a person or entity within or outside of the project with a specific key interest or stake in the project. For example, a Financial Controller will be interested in the cost of the project, and a CEO will be interested in whether the project helps to achieve the company vision.

- **Roles:** Now list the key roles involved in delivering the project. Examples of roles include the Project Sponsor, Project Board and Project Manager. Then summarize each of the primary responsibilities of each role identified.

- **Structure:** Once you have a clear view of the roles needed to complete the project, you can depict the reporting lines between those roles within a *Project Organization Chart*.

Step 3: Plan the Approach to Implementation

You now have a solid definition of what the project needs to achieve and how it will be organized to achieve it. The next step is to describe the implementation approach as follows:

- **Implementation Plan:** To provide the Customer and Stakeholders with confidence that the project implementation has been well thought through, create an *Implementation Plan* listing the phases, activities and timeframes involved in the project.

- **Milestones:** In addition, list any important milestones and describe why they are critical to the project. A *milestone* is typically an important project event, such as the achievement of a key deliverable.

- **Dependencies:** List any key dependencies and their criticality to the project. A *dependency* is defined as an activity that is likely to impact on the project during its life cycle.

- **Resource Plan:** Create a plan which summarizes the resources involved in the project by listing the labor, equipment and materials needed. Then budget the financial resources needed.

Step 4: List the Risks and Issues

The final step taken to complete your Project Charter is to identify any project risks, issues, assumptions and constraints related to the project.

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And that's it. If you complete each of the steps above, then you will create a solid Project Charter for your project, helping you to manage scope and deliver consistently on time and within budget.

Five Top Project Documents

If you use the documents as a starting point for keeping up with your projects, then you will be well on the way to being highly valued and appreciated within your company.

1. **The Project Charter**

The project charter can be considered the green light for the project to move forward. Project activity can begin once the project charter has been assembled and approved. The purpose of this document is to outline the reasons and objectives for the project, items that would be considered in-scope or out-of scope, target project benefits, and most importantly a high-level budget and who has the authority to expend these resources.

The project charter also serves as a stabilizing force once the project is underway. There are going to be opinions and ideas of what aspects of a project should be left in and which should be removed. These opinions and ideas creep in based upon managers and resources personal preferences. The project charter can serve as a reference point for the original intent of the project and to ensure the project does not succumb to scope creep.

2. **The Project Schedule**

The project schedule is the next must-have document to effectively run a project. The very definition of a project (a temporary endeavor with a defined beginning and end taken to meet unique goals and objectives) speaks to the importance of the project schedule. The project schedule takes the beginning and end of the project and breaks it down into project phases and then ultimately project tasks. Each task is assigned duration, resource, and whether it is dependent upon a previous task or activity prior to its start. This document then serves as the baseline for whether the project is on track and meeting its target dates or if there needs to be some adjustments made to the schedule.

3. **The Status Report**

It's important to keep everyone informed as to how things are progressing on the project once everything gets underway. There's no better way to do this than putting together a status report. A status report should contain the answers to these four questions:

- What has been accomplished on this project since the last status report?

- What is next to being done on this project?

- What stands in the way of this project being complete?

- Are there any special needs this project has that must be discussed?

A status report does not need to be overwhelming to put together and it should always be easy to read. It's good to come up with some type of status code (for example...Green, Yellow, Red always works well) that can quickly provide an overall status of the project at one quick glance. If an executive sees everything is Green he won't give the project a second thought. If the status is slipping into Yellow or Red, then the executive knows they must get involved at this point.

4. **The Risk Register**

Your job as a Project Manager is to get the project done. However, there are powerful forces at work whose sole purpose is to prevent you from getting your project done. These forces are known as Risks. These risks could range from a critical resource getting sick on your project to a key vendor going out of business.

You need to call these risks out on a regular basis and prevent them from turning into full-blown issues that can wreak havoc on your project. There's no better place to do this than the Risk Register. This document identifies potential risks and categorizes them by probability of occurring and the severity of their impact to the project if they do occur. Plus, there needs to be a mitigation strategy coupled with each risk as to what is being done to prevent this risk from occurring.

5. **The Communications Plan**

The final document every project must have is a communication plan. There are so many things going on with a project that is going full-steam ahead it's hard to remember who needs to know what and when they need to know it. A well-thought out communication plan will minimize any miscommunication that could occur and keep everyone on the same page.

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Method123 (www.Method123.com) and the Template Collective (www.TemplateCollective.com) contain all the templates you need to get your project started.

Five Steps to Properly Plan Your Projects

It doesn't matter which industry you're in or project you're involved with, these 5 steps should be taken every time to properly plan your project:

Step 1: Direction

Before you start out, set the direction for the project. Do this by clearly identifying the project vision, goals and deliverables. State the overall timeframes for delivery and clarify the amount of resource available. Determine what is "in scope" and "out of scope". Identify the benefits and costs in delivering the project and any milestones and constraints. Only once this is agreed with your Project Sponsor will you know what it is that you have to achieve.

Step 2: Task Selection

You're now ready to start planning. Identify the groups of tasks that need to be completed to build your project deliverables. Then for each group of tasks, breakdown those tasks into sub-tasks to create what is known as a "Work Breakdown Structure" (WBS). Your WBS is essentially a hierarchical list of tasks, in order. Assign start and end dates to each task, as well as task durations. Always add a little extra time (e.g. 10%) to your durations, providing you with contingency. Next add Milestones to your plan. These are tasks that represent major achievements along the way.

Step 3: Inter-linking

The next step is to add links (or dependencies) between project tasks. While there are a variety of link types, most Project Managers add "finish-to-start" links so that one task cannot start until another one finishes. To make your project achievable, only add links between tasks if there is a critical dependency between them. Remember, when one task slips, all tasks linked to it may slip as well. So use links wisely.

Step 4: Resource Assignment

Now comes the fun part, assigning resources. A "resource" may be a person, equipment, location or materials. Against each task in your plan, assign one or more resources required to complete it. As you assign resources, watch your resource utilization. In other words, make sure you don't over-assign a specific resource to multiple tasks, so that it's impossible for that resource to complete everything assigned to it. Project Manager makes this easy for you, by telling you the resource utilization as you assign resources to projects.

Step 5: Baseline, Actual and Reporting

With a fully completed project plan, you're now ready to save it as a "baseline", so that you can later compare your progress against it. Then start recording your actual progress against the plan. Every day, record the amount of time you've spent against each task. Also record the new planned start and finish dates, and monitor the overall project completion date. Report on progress as you go. By regularly updating the project plan with your progress, you can control the delivery of your project and meet those critical goals set.

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And there you have it. If you'd like smart software to help you plan your projects, see Project Manager

Five Tips - Project Management for Dummies

You can manage any type of project, by taking these five 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 prioritize your work. Limit the number of meetings you have and keep telephone calls short. Only work on prioritized tasks. If something arises that is non-critical then keeps a record of it and move on.

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Work smart by using clever tools. Use project management templates to help you deliver your project.

Five Main Responsibilities of a Project Manager

1. **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.

2. **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.

3. **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.

4. **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.

5. **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, and morale-building, bottom-line focused Project Manager! Who wouldn't want to have someone like that heading up their next project?

Five 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.

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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.

Five Roles 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 of a 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 to the right people at the right time.

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Understanding the roles of a Project Manager has been laid out now it is time to execute.

Five 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!

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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.

Five Goals of a Project Manager

These goals are generic to all industries and all types of projects. Regardless of your level of experience in project management, set these 5 goals for every project you manage.

Goal 1: **To Finish on Time**

This is the oldest but trickiest goal in the book. It's the most difficult because the requirements often change during the project and the schedule was probably optimistic in the first place.To succeed, you need to manage your scope very carefully. Implement a change control process so that any changes to the scope are properly managed.Always keep your plan up to date, recording actual vs. planned progress. Identify any deviations from plan and fix them quickly.

Goal 2: **To Finish on or under Budget**

To make sure that your project costs don't spiral, you need to set a project budget at the start to compare against. Include in this budget, all of the types of project costs that will accrue, whether they are to do with people, equipment, suppliers or materials. Then work out how much each task in your plan is going to cost to complete and track any deviations from this plan.

Make sure that if you over-spend on some tasks, that you under-spend on others. In this way, you can control your spend and deliver under budget.

Goal 3: **To Meet the Requirements**

The goal here is to meet the requirements that were set for the project at the start. Whether the requirements were to install a new IT system, build a bridge or implement new processes, your project needs to produce solutions which meet these requirements 100%.

The trick here is to make sure that you have a detailed enough set of requirements at the beginning. If they are ambiguous in any way, then what was initially seen as a small piece of work could become huge, taking up valuable time and resources to complete.

Goal 4: **To Keep Customers Happy**

You could finish your project on time, under budget and have met 100% of the requirements-but still have unhappy customers. This is usually because their expectations have changed since the project started and have not been properly managed.

To ensure that your project sponsor, customer and other stakeholders are happy at the end of your project, you need to manage their expectations carefully. Make sure you always keep them properly informed of progress. "Keep it real" by giving them a crystal clear view of progress to date. Let them voice their concerns or ideas regularly. Tell them upfront when you can't deliver on time, or when a change needs to be made. Openness and honesty are always the best tools for setting customer expectations.

Goal 5: **To Ensure a Happy Team**

If you can do all of this with a happy team, then you'll be more than willing to do it all again for the next project. And that's how your staff will feel also. Staff satisfaction is critical to your project's success.

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So keep your team happy by rewarding and recognizing them for their successes. Assign them work that complements their strengths and conduct team building exercises to boost morale.

With a happy motivated team, you can achieve anything!

Five 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.

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

Once your project plan is ready to go, use Project Software to quickly build detailed plans for your project and set milestones to track your progress.

Five Tips to Deliver Projects Successfully

These 5 tips will give you a head start:

1. **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. And if you involve them early enough, they will be more supportive to your cause.

2. **Hand it Over**

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 it anyway.

3. **Become a 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. Remember, there is no "I" in "team".

4. **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 it, double-question it and only when you're certain it's for the best, implement it.

5. **Work Smart and Hard**

Try not to start from scratch. Give yourself a head-start wherever possible by using tools like Method123 (www.Method123.com) and the Template Collective (www.TemplateCollective.com). These templates boost the quality of your deliverables, while saving you time and effort.

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Now that you know you these five tips it is time to deliver those projects successfully.

Six Steps to Initiate Projects Successfully

Did you know that a large percentage of projects are cancelled before they even reach the detailed planning phase? The most common reason is that they have not been properly defined and scoped, and as a result, they lack the sponsorship needed to ensure their success. If they do manage to secure sponsorship, then Project Managers often find it difficult to control changes to the project scope, as they do not have a clearly defined scope statement to measure against.

For these reasons, it's critical that you initiate your projects as quickly and efficiently as possible, by taking these 6 steps:
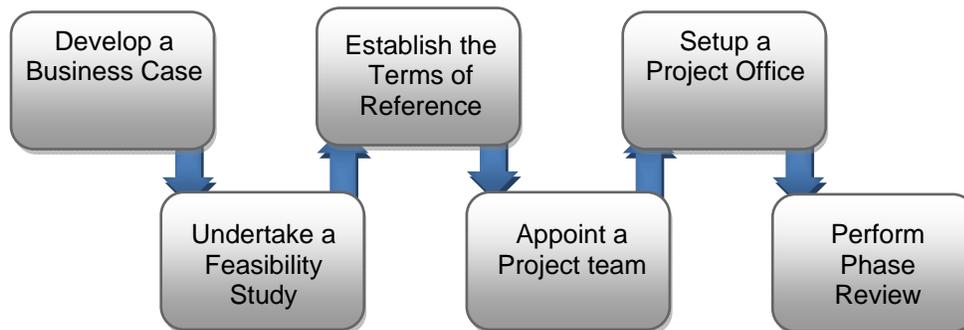
A description of each step follows:

Step 1: Develop a Business Case

The first step taken when initiating a new project, is the creation of a comprehensive Business Case. A Business Case describes the business problem / opportunity to be addressed by the project and the alternative solutions available. The potential costs and benefits associated with each alternative solution are also defined.

The Business Case becomes the foundation for the project as it fully documents the reasons for creating the project and the key benefits to be delivered. Once produced, the Business Case should be formally endorsed by the Project Sponsor, before funding is allocated to the project.

Step 2: Perform a Feasibility Study

A Feasibility Study is completed to identify the likelihood of the alternative solutions actually delivering the benefits stated in the Business Case. Based on the results of the Feasibility Study and the Benefits and Costs portrayed in the Business Case, a preferred solution is identified and once again, is approved by the Project Sponsor.

If you can complete a comprehensive Feasibility Study, then you will greatly improve your chances of delivering your project successfully.

Step 3: Establish the Terms of Reference

Once the problem and solution have been identified, a new project is then defined to deliver the solution. The "Terms of Reference" are documented, which essentially describe what the project sets out to achieve and the boundaries within which it must achieve it.

The project vision, objectives, scope, deliverables, project organization and an implementation plan are all clearly stated in the Terms of Reference document. The Terms of Reference may be otherwise known as a "Project Charter" or "Project Definition Report".

Step 4: Appoint the Project Team

Now that the project is defined, it is time to appoint the team. The Project Board is established and the Project Manager is recruited to take on responsibility for the project. The Project Manager recruits the Team Leaders and they in turn help recruit project staff. Every team member is assigned a detailed Job Description, defining their role and responsibilities within the project.

Step 5: Set up a Project Office

The Project Office environment is then established, as the physical place of residence for the team for the duration of the project. This environment will provide the premises, equipment, materials, tools and processes required to enable the members of the project team to perform their roles successfully. A checklist is used to ensure that the Project Office has been set up correctly and will continue to support the Project as needed.

Step 6: Perform Phase Review

Once the project has been defined and the team has been appointed, you're ready to perform a project phase review. A Phase Review is completed to ensure that all of the required Initiation activities have been taken and to provide formal approval to proceed to the next phase: Project Planning.

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And there you have it - six steps to initiating projects successfully. If you would like to use templates to complete each of these activities quickly and efficiently, then read about the Project Initiation Kit from Method123 (www.Method123.com) and the Template Collective (www.TemplateCollective.com). This kit includes all of the templates, forms and processes required to perform the above steps faster than ever before.

Six Components of a Project Plan

The first activity within the Planning phase is the creation of a Project Plan. To create a Project Plan, you should first identify the 'Work Breakdown Structure' (WBS) which is a hierarchical set of phases, activities and tasks to be taken on the project. After the WBS has been agreed, an assessment of the effort required to complete the activities and tasks is made. The activities and tasks are sequenced, resources are allocated and a detailed project schedule is formed. The Project Plan should include:

1. A detailed description of the project scope

2. A list of the project milestones (descriptions and dates)

3. A list of the project phases, activities and tasks

4. Resources/effort allocation against phases, activities and tasks

5. A project schedule depicting when the tasks will be taken

6. A list of planning dependencies, assumptions and constraints

This project schedule will become the primary tool for the Project Manager to assess the progress of the project.

Eight Documents to Effectively Plan a Project

During the Project Planning phase, you will create a suite of documentation used to schedule staff, expenditure and equipment on the project. The following documents should be created:

1. Project Plan (outlines the activities, tasks, dependencies and timeframes)
2. Resource Plan (lists the labor, equipment and materials required)
3. Financial Plan (identifies the labor, equipment and materials costs)
4. Quality Plan (provides quality targets, assurance and control measures)
5. Risk Plan (highlights potential risks and actions taken to mitigate them)
6. Acceptance Plan (lists the criteria to be met to gain customer acceptance)
7. Communications Plan (lists the information needed to inform stakeholders)
8. Procurement Plan (identifies products sourced from external suppliers).

At this point the project has been planned in detail and is ready to be executed.

Ten Steps to Manage Small Projects

So what is a "small project" vs. a "large project"? It's fair to say that small projects have:

- A lower project budget

- Very short delivery timescales

- Less people and more limited resources

- Lower risk and fewer project issues

- More clearly defined deliverables

However small projects are not necessarily easier to manage than large projects! They may still be complex and involve a range of departments, resources, suppliers and customers to complete them. So to boost your chances of success, we have set out here, the Project Life Cycle for managing small projects:

Step 1: Create a Terms of Reference

For small projects, the first step to take is usually the creation of a Terms of Reference. This document describes the project vision, scope, objectives, deliverables, timeframes and known risks for the project.

You need to get all of the project stakeholders to agree to this document, so that you gain a crystal clear view of what the project is to achieve. Without formal approval, projects suffer scope creep, lack of change control, poor sponsorship and communication problems.

Step 2: Appoint the Project Team

Thanks to your Terms of Reference, everyone agrees what it is that has to be achieved. You're now ready to appoint your team. For small projects, you will usually need to gain the support of senior management, to allocate resource to your project from within the business. You will probably have a very limited budget for appointing external suppliers, consultants and contractors. But if they are required, you will need to formalize supplier contracts at this point.

Regardless of the project role appointed, make sure you create a clear Job Description first, so that staff knows exactly what's expected of them.

Step 3: Set up the Project Office

Even small projects need the support of a project office, which help with project reporting, risk / issue / change resolution, training and administration. For small projects, you will need the services of your project office to make sure that your project conforms with internal standards and processes, and to get project support when you need it.

Step 4: Create a Project Plan

The Project Plan is more than just a schedule of events. It describes the entire Work Breakdown Structure (WBS) for the project by defining all of the phases, activities and tasks required to deliver it. It also sets out the project scope, milestones, effort, deliverables, resources and dependencies in detail.

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For smaller projects, your project plan will become your "single view of progress for the project." By updating it immediately after your weekly project status meetings, you can ensure that you remain on track.

Ten Tips for Project Success

1. ***Starting out:*** Make sure that when you start out your customer defines their requirements in depth. You need to know exactly what it is that must be delivered, to who and when. Make it specific, write it up formally and get them to sign it off. This document will become the basis upon which to measure your success.

2. ***Customers:*** Involve your customers throughout the entire project life cycle. Get them involved in the analysis and planning, as well as execution. You don't have to seek their approval, just keep them informed. The more you involve them, the greater their level of buy-in and the easier it is to manage their expectations.

3. ***Timeframes:*** Keep your delivery timeframes short and realistic. Never agree to lengthy timeframes. Split the project into "mini-projects" if you need to. Keep each mini-project to less than 6 months. This keeps everyone motivated and focused.

4. ***Milestones:*** Break your project timeframe into "Milestones" which are manageable pieces of work. Add delivery deadlines to your milestones and try to deliver on every deadline, no matter what. If you're late, tell your customer about it as early as possible.

5. ***Communications:*** Make sure you keep everyone informed by providing the right information at the right time. Produce Weekly Status Reports and run regular team meetings. Use these Project Management Templates to save you time.

6. ***Scope:*** Only authorize changes to your project scope if there is no impact on the timeline. Get your customers approval to important scope changes first and then get their buy-in to extend the delivery dates if you need to.

7. ***Quality:*** Keep the quality of your deliverables as high as possible. Constantly review quality and never let it slip. Implement "peer reviews" so that team members can review each other's deliverables. Then put in place external reviews to ensure that the quality of the solution meets your customer's needs.

8. ***Issues:*** Jump on risks and issues as soon as they are identified. Prioritize and resolve them before they impact on your project. Take pride in keeping risks and issues to a minimum.

9. ***Deliverables:*** As each deliverable is complete, hand it formally over to your customer. Get them to sign an Acceptance Form to say that it meets their expectations. Only then can you mark each deliverable off as 100% complete.

10. ***Your team:*** Great projects are run by great teams. Hire the best people you can afford. Spend the time to find the right people. It will save you time down the track. Remember, good people are easy to motivate. Show them the vision and how they can make it happen. Trust and believe in them. Make them feel valued. They will work wonders.

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Well, there you go, your ten tips for project success… time to put them into action.

Ten Top 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 Made Quickly**

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 cliché 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.

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These are the things that YOU do to manage a project successfully. For the rest of us, we need to hear these things ten more times!

Ten Steps to Planning a Project

If you want to plan projects quickly and efficiently, then take the following ten steps:
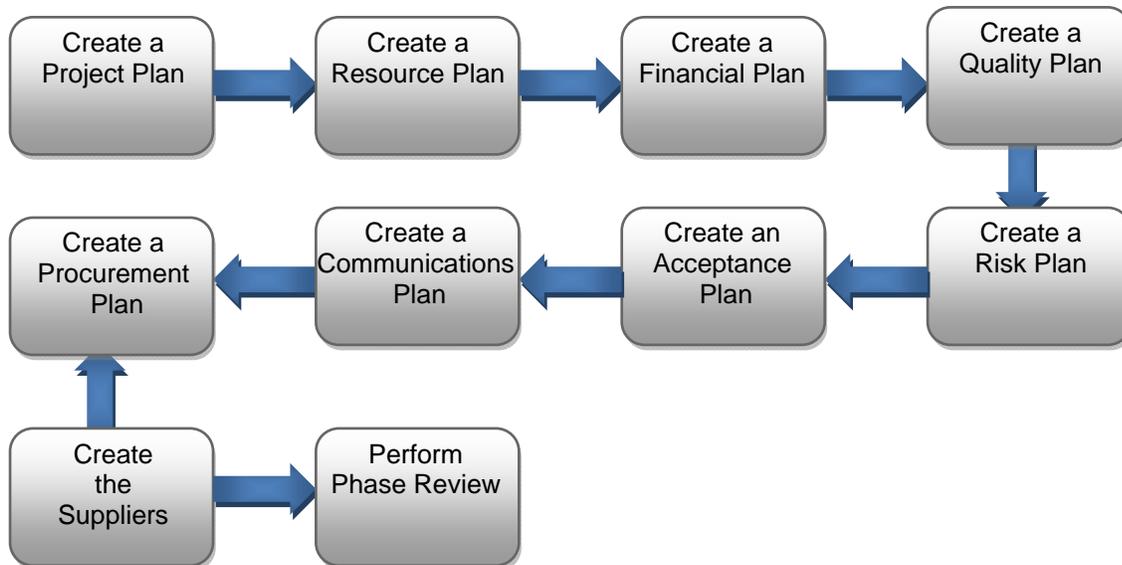
A description of each step follows:

Step 1: Create a Project Plan

Firstly, you need to create a comprehensive Project Plan, which is critical to the success of the project. The Project Plan identifies the Work Breakdown Structure (WBS) of the phases, activities and tasks to be taken. It defines the sequencing, duration and dependencies of each task, as well as the generic resources and financial expenditure required to complete your project.

Step 2: Create a Resource Plan

Following the creation of a Project Plan, a detailed assessment of the resources required to complete the project should be made. The required labor, equipment and materials should be listed and the amount of each resource quantified. Finally, the resource consumption should be scheduled to provide the Project Manager with a complete view of the total amount of resource needed for each stage of the project.

Step 3: Create a Financial Plan

The Financial Plan describes the total quantity of financial resources required during each stage of the project. The total cost of each item of labor, equipment and materials is calculated, as well as the total cost of undertaking each activity within the Project Plan.

Step 4: Create a Quality Plan

To ensure that the project deliverables meet customer requirements, a Quality Plan is developed. This plan explicitly lists the quality targets to be achieved, and a suite of Quality Assurance and Quality Control activities are scheduled to ensure that the required level of quality is achieved throughout the project.

Step 5: Create a Risk Plan

Managing Project Risk is a critical process within the Project Lifecycle. To mitigate risk effectively, all foreseeable project risks are identified and rated in terms of their likelihood of occurrence and potential impact on the project. The risks are prioritized and a set of actions identified to reduce the likelihood of each risk and its impact on the project should it occur.

Step 6: Create an Acceptance Plan

The key to customer satisfaction is in gaining approval from the customer that the deliverables meet the quality criteria stated in the Quality Plan. To ensure that customer acceptance is sought for each deliverable produced by the project, an Acceptance Plan is created. The Acceptance Plan provides a schedule of Acceptance Reviews which are taken to gain customer acceptance for the completion of each deliverable within the project.

Step 7: Create a Communications Plan

A Communications Plan is a document which describes the information to be provided to project stakeholders to keep them informed of the progress of the project. Each stakeholder is listed and their requirements for information clearly identified. A schedule of communication events and activities are laid out to ensure that the right information is communicated to the right people at the right time.

Step 8: Create a Procurement Plan

Projects often need to acquire procurement items (such as products, services and specific results) from external suppliers. The Procurement Plan describes which items will be sourced from external suppliers and the timeframes and methods for delivery.

Step 9: Contract the Suppliers

With a clear view of the procurement items to be acquired, the project team will set out to select and contract one or a small number of preferred suppliers to the project.

Step 10: Perform Phase Review

With a detailed understanding of the activities, resources, finances and supplier relationships required to complete the project, the team is ready to enter the Execution phase. A Phase Review is taken to ensure that all of the required Planning activities have been completed and to provide formal approval to proceed to the Project Execution phase.

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There you have it. By completing these ten steps, you will create a comprehensive suite of Project Plans which enable you to properly control people, resources, finances, suppliers and tasks throughout the entire Project Lifecycle.

If you would like to use a suite of templates to complete each of these activities quickly and efficiently, then read about the Project Planning Kit from Method123 (www.Method123.com) and the Template Collective (www.TemplateCollective.com). This kit includes all of the templates, forms and processes required to perform these 10 steps faster than ever before.

Build and Manage Project Schedule

Three Steps to Creating a Resource Plan

A Resource Plan describes the physical resources required to complete a project. It lists each of the resource types (such as labor, equipment and materials) and it provides a schedule for the consumption of each resource respectively. If you would like to define a comprehensive Resource Plan for your project, then we suggest that you take the following three steps:

First, you need to identify all of the different types of resource needed to complete the project. You then need to quantify the amount of each type of resource required. And finally, you need to schedule the consumption of each resource within the project. Let us describe each step in a little more detail...

Step 1: List the Resource Required

You should start by listing the resources required to complete the project.

- **Labor**. Identify all the roles involved in performing the project, including all full-time, part-time and contracting roles.

- **Equipment**. Identify all of the equipment involved in performing the project. For instance, this may include office equipment (e.g. PCs, photocopiers, and mobile phones), telecommunications equipment (e.g. cabling, switches) and machinery (e.g. heavy and light machinery).

- **Materials**. Identify all of the non/consumable materials to complete project activities such as office materials (e.g. photocopy paper, stationery, and ink cartridges) and materials required to build physical deliverables (e.g. wood, steel and concrete).

Step 2: Quantify the Resource Required

The next step is to describe the specification of each resource.

- **Labor**, list the skills and experience required by each role

- **Equipment**, list the specification of each equipment item

- **Materials**, list the type of each item of material required

Then quantify the amount of each resource by stating the total quantity needed, the date within which it must have been acquired and the date that it is expected to have been consumed by.

Step 3: Construct a Resource Schedule

You have now collated all the information required to build a detailed Resource Schedule. Create a resource schedule which specifies the:

- Resources required to complete the project

- Timeframes for the consumption of each resource

- Quantity of each resource required per week

- Total quantity of resource consumed per week

- Assumptions and constraints identified

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And that's it, your three steps to creating a resource plan.

Three Steps to Closing Projects Quickly and Efficiently

Once all the deliverables within a project have been completed and approved by the customer, the project is ready for closure. Closing a project is a task not to be under-rated, as it requires the review of the entire project to date and the completion of a comprehensive set of closure actions. The following diagram depicts the steps involved in performing project closure:

```
┌──────────────┐      ┌──────────────┐      ┌──────────────┐
│   Confirm    │      │   Identify   │      │   Complete   │
│   Project    │ ───▶ │   Closure    │ ───▶ │   Closure    │
│  Completion  │      │   Actions    │      │   Actions    │
└──────────────┘      └──────────────┘      └──────────────┘
```

Step 1: Confirm Project Completion

The first step in closing a project is to confirm that the project is ready to be closed. The project is only ready for closure when all the completion criteria specified in the Terms of Reference have been met in full. Examples of completion criteria may include:

- The project **vision** has been achieved.

- All the project **objectives** have been met.

- The project has resulted in the stated **benefits**.

- All the **deliverables** specified have been produced.

If you're confident that the project has met all of the completion criteria specified, then the next step is to identify any outstanding items. These are typically activities listed as "Incomplete" on the Project Plan; however they may also be miscellaneous risks, issues or general items that are noteworthy and need to be raised. Identify the outstanding items required to be completed, in order to confirm that the project is ready for completion.

Step 2: Identify Closure Actions

Now that you've confirmed that the project is ready for closure, you're ready to document the actions needed to close the project, within a "Project Closure Report". This report describes how the:

- Deliverables will be handed over to the customer

- Documentation will be handed over to the business

- Supplier Contracts will be terminated and contractors released

- Project resources will be released. This includes: staff, equipment and materials.

You should also identify the actions required to close down the Project Office, including the cessation of premise rental agreements and cancellation of supply accounts such as water, electricity and phone lines.

You should then create a plan for communication of the project closure to all stakeholders. Note: You may need to create different messages for different audience groups.

Step 3: Perform Closure Actions

Following the approval of the "Project Closure Report" by the Project Board, the Project Manager will be responsible for performing each of the actions listed within the specified dates.

The Project Manager and Project Sponsor will stay in close contact as each closure action is performed, to ensure that the project is closed quickly and efficiently. Only after all of the actions specified within the Project Closure Report have been completed, will the project be designated as officially closed.

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That is how you close projects quickly and efficiently.

Three Steps to Project Time Management

Time Management is the process of monitoring and controlling time spent within a project. By recording the actual time spent by staff on a project, you can:

- Calculate the **time** spent performing tasks
- Identify the staff **cost** of performing tasks
- Control the level of **resources** allocated to tasks
- Monitor the **completion** percentage of tasks
- Identify any **outstanding** work required to complete tasks

To do all of this effectively within your project, you need to implement a structured Time Management Process. This process uses "Timesheets" upon which staff record their time spent performing tasks. The process also involves the use of a "Timesheet Register", upon which you collate the time recorded by staff. With this information, you can update the Project Plan and assess whether or not the project is on time and likely to deliver within schedule. Here's how you do it.

Step 1: Document Timesheet
The first step in the process is to capture all of the time spent completing project tasks, using a Timesheet. All project leaders, team members, staff and contractors responsible for completing tasks in the Project Plan should complete Timesheet forms to record the time they spend.

Timesheets exist in various formats, including paper, spreadsheet and software, and they should be used from the moment the Project Plan is approved until the project is closed.

To ensure that all staff members record their time accurately, they should complete their Timesheets as they complete each task, rather than waiting until the end of the reporting period to complete them. They should then forward their completed Timesheets to the Project Manager on a weekly basis for approval.

Step 2: Approve Timesheet

Upon review of each Timesheet, the Project Manager will:

- Confirm the time spent against tasks listed in the Project Plan
- Confirm the team member was delegated the task
- Determine whether the time spent was reasonable
- Identify whether sufficient progress has been made
- Identify issues with the time spent and the progress achieved

Based on these conclusions, the Project Manager may decide to approve the timesheet, request further information from the staff member regarding the time spent, or declines it and raises a staff issue.

Step 3: Update Project Plan

After approval, the Project Administrator then enters all time recorded, against the Project Plan. This allows them to identify:

- The total time spent per project activity

- The percentage completion of each project activity

- The overall delivery of the project against the schedule

- Tasks that exceed their completion date or forecast effort

The Project Manager is then notified of any exceptions and can choose to take corrective actions, such as:

- Changing the team member assigned to the task

- Allocating additional team members to the task

- Providing additional time for completing the task

- Requesting assistance from suppliers to help complete the task

Throughout the Time Management Process, the Project Administrator monitors and controls the time spent within the project, by keeping a Timesheet Register up-to-date.

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And there you have it. If you take these 3 steps for performing Time Management within your project, you'll greatly increase your chances of delivering projects on time and within schedule.

Four Steps to Keep Your Project Plan Up-To-Date

Whether you're managing small, medium or large scale projects, you need to keep your project plan up-to-date on a regular basis. Most Project Managers update their Project Plan on a weekly basis to ensure that they will produce the required deliverables, within the agreed schedule.

However the process of entering all of the required information into the project plan and having it ready for review on a weekly basis, is not an easy one! But if you take these simple steps listed below, then you will be able to update your Project Plan quickly and accurately, giving you all of the information you need to make decisions about the project.

Step 1: Enter Timesheet Information

The first step taken when updating your Project Plan is to identify how much time your staff has spent on the project. You need to calculate:

- The total time spent by full-time and part-time staff

- All time spent by contractors and suppliers

- Any time spent by internal staff

To capture this information quickly and accurately, you should make sure that all staff who have been accounted for in the Business Case submit to you a Timesheet on a weekly basis. By collating the time captured within each timesheet and allocating it against the respective project activities in the Project Plan, you will be able to determine whether the budgeted time allocated to each project activity has been exceed or not.

Step 2: Enter Deliverable Information

You now have an idea of the time spent completing each activity and project deliverable. But what is the status of the deliverable? How complete is it? Your team now need to update the project plan with the current percentage completion of each deliverable to give you an idea of how much has been achieved vs. the time spent achieving it.

For instance, your team might have already used all of the time budgeted to complete a deliverable, but the deliverable might only be 50% complete!

By comparing the percentage completion of each deliverable vs. the percentage of budgeted time used, you will have a good idea of whether the team is currently on track. Any delivery issues can then be identified and you can immediately take action to rectify them.

Step 3: Enter Financial Information

The last step taken to update your Project Plan is to enter the total expense information for the project to date. You will need to gather all of the project invoices for the current reporting period (e.g. the prior week) and calculate the total cost of completing each activity and deliverable within the project. Then enter this information into the project plan.

You can then use this information to check the percentage completion of the deliverable against the percentage consumption of the available budget. You'll easily be able to identify any instances of over or under spending, and take action to rectify any issues.

Step 4: Perform Project Planning Maintenance

Having now updated your Project Plan and determined whether your project is on track, there are several other tasks to perform, including:

- Re-baselining the Project Plan if needed

- Updating the Resource Plan

- Updating the Financial Plan

- Updating the Quality Plan

- Updating the Risk Plan

- Updating the Acceptance Plan

- Updating the Communications Plan

- Updating the Procurement Plan

By keeping your Project Plan up-to-date, you can keep an eye on the overall status of the project at all times. You'll be able to identify any delivery issues early and the take action when needed, to keep the project on track. As a Project Manager this is your single most important project task.

Four Steps for Documenting a Resource Plan

The following diagram depicts the activities taken during the Project Planning phase:

Develop Project Plan	Develop Resource Place	Develop Financial Plan	Develop Quality Plan	Develop Risk Plan

Develop Acceptance Plan	Develop Communi-cations Plan	Develop Procurement Plan	Contract Supplies	Perform StageGate

A key document created during this phase is the Resource Plan. A Resource Plan identifies the physical resources responsible for working on each of the activities and tasks within the project. A typical Resource Plan should

1. List the general types of resources to be utilized on the project

2. Identify the number of resources and purpose of each type of resource

3. Identify when the resources are required by completing a 'Resource Schedule' table

4. Allocate the resources to project activities by completing a 'Resource Usage' table.

The Resource Plan is an important element of many projects - especially larger ones.

Five Ways to Manage To Do Lists

To deliver your project successfully, you need to complete the right tasks at the right time. That's why people create "To Do Lists" - so that they know what they have to do and by when.

But it's not that easy. You're often adding more tasks to your lists than you are completing them, so you feel like you're not getting ahead. Here's what to do...

1. Create only One List

If you have lists on your desk, in your car, or on post-it notes, then merge them all into one list. Then group the items in your list and try and put them in a logical order. As soon as you've done this, you'll immediately feel like a weight has been taken off your shoulders, because everything you have to do is now all in one place. You're ready to take the next step...

2. Set Target Dates

Now sit back and think about what you have to achieve and by when. Write down your targets and deadlines. If you're unsure what these are, speak to your boss and get them to list the top 5 things they want you to do and by when. Write them down and try and get your boss to prioritize them, so you know which items are critical.

3. Set Clear Priorities

Type your list into your PC and prioritize it based on:

- The targets and dates sent

- The amount of work each item will take

- The complexity in completing the task

- The importance of the task to the project

- The deadlines for completion

4. Define the Critical Path

On many projects, not all tasks get done. There simply isn't the time. So you need to identify the 'critical path' tasks which are those that simply have to be done to complete the project. The question to ask yourself is "if this task is late, will it cause the overall project to be late?" If the answer is 'yes', then that task is on the critical path to success. You need to complete these critical tasks as a higher priority than others.

5. Manage your Llists

Take the next step by setting target completion dates for your critical tasks. You then need to do everything in your power to make sure that these dates are met. Don't worry about settings dates for non-critical tasks. It takes too much time and things change anyway.

Then as the project evolves, tick-off the tasks as they are completed. And when new tasks arrive, decide whether they are critical or not and if they are, then set targets dates for them as well. Always keep your list up-to-date, as it will help you complete the right tasks at the right time.

Five Tips to Deliver your Projects Faster

Here are five tips for delivering projects faster...

Tip 1: Find Shortcuts in your Plan

Project Managers usually spend 80% of their time *executing* and 20% *planning*. The reason is that the Execution phase is where the excitement is, so they roll their sleeves up and get started executing as quickly as possible.

But if you spend extra time in the Planning phase, then you can usually identify shortcuts which enable you to produce the same project outcome in less time.

So when you think your project plan is complete, take extra time to re-look at your plan from the point of view of delivering it faster. By doing this, you'll find that you can schedule things to be done in a way that takes less time, with less effort.

Tip 2: Automate Manual Tasks

You need to automate your manual daily tasks to help you do things faster. Here are some of the manual tasks that many Project Managers do each week that could be automated using project software:

- Summarizing data for your Weekly Status Reports
- Collating Timesheets and Expense Forms
- Updating your Project Plan with timesheet data
- Working out whether the project is on track
- Reporting on risks, changes and issues.

You don't need to perform these tasks manually. You can invest in project software to do all this for you. Your team will enter the data you need and the software will group and summarize it all for you. All you need to do is run reports and view the current status of your plan to ensure it remains on track.

Tips 3: Manage Execution Carefully

When your project gets underway, manage your project against the plan vigilantly. It's easy for the plan to sit on the shelf, and for the team to go in their own direction. Instead, you need to lead the team by making sure they complete only those tasks which have been planned, and not other tasks which have cropped up along the way. So manage the project execution carefully. You can also save time in the Execution phase by:

- Working your suppliers and contractors hard
- Mitigating risks and issues before they affect the timeframe
- Saving all non-critical tasks until after the project is complete
- Not allowing unplanned tasks to be completed, unless critical
- Not implementing change requests, unless they are critical.

Tip 4: Double up on Resources

Usually, the easiest way to shorten the length of the project is to assign more resources to it. However, this isn't possible for many projects because they have a limited budget and a limited pool of resource.

But that's not to say that you can't double up on resources for the right tasks. It just means that if you do this, then other tasks will be under-resourced. So why would you do this?

In most projects there are tasks on the "critical path" that must be completed to deliver the project. If you assign more resources to these tasks than are necessary, you can usually complete them earlier than expected. And it makes sense that if every critical path task is completed faster, then the entire project will be delivered quicker than expected.

Tips 5: Get the Critical Tasks done first

In many projects the last 20% of tasks, take 50% of the length of the project. This is because the team has left the difficult tasks until the end, which happens to be when they are tired and need a holiday!

Instead, identify the tasks in your plan which is the most complex and challenging to complete. And if possible, tackle those tasks at the start of the project, when people are fresh and enthusiastic. You'll find that they can complete those tasks in less time and to a higher standard of quality than if they were left until the end of the project. And with those difficult tasks completed, the rest of the project should be easier to deliver.

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If you truly want to speed up your project delivery, use the Project Management Kit of templates from Method123 (www.Method123.com) and the Template Collective (www.TemplateCollective.com). They are pre-formatted and come with all of the charts, tables and examples you need to do things quickly.

Five Tips to Monitor Your Projects

Tip 1: Time Management is Critical

If you want to deliver your project on-time, then you need to have a good understanding of what your team spend their time doing. That makes sense, right?

Start by using time tracking software to record time spent. Make sure that every team member records the tasks they are working on and the time they have spent, every day of the project.

You need to then review that time and make sure that it's appropriate. Are they spending the right amount of time on the right tasks, to achieve the right outcomes?

As well as monitoring the time spent, you need to understand the time *remaining*. So update your project plan weekly with the revised planned finish dates. Only then can you calculate the actual vs. planned progress of the project.

Tip 2: Track Percent Complete

One of the easiest ways to monitor the project is to keep an eye on the overall "percent complete". You need to identify the actual % complete of every task and then compare it to the planned % complete (i.e. what the % complete should be as of today).

If overall, your project should be 50% complete and yet you are only 43% complete, then you have a lot of work to do, to get back on track.

Tip 3: Monitor Spend vs. Budget

You also need to continually monitor the current cost of the project vs. the budget set. Record:

- One-off expenses, using "Expense Forms".

- The cost of your resources by calculating the cost per hour of each person in your team, times the number of hours spent working on project tasks.

- All miscellaneous, recurring and ongoing expenses.

Summarize your project expenses every week and compare them to budget.

Tip 4: Keep one eye on tasks and the other on your team

Projects are always stressful. Your team has too much work to do and limited time in which to do it. So given that your team will be under stress for the length of the project, you need to monitor their motivation levels at all times.

Every week, hold a team meeting and while communicating the status of the project, find out where their motivation levels are at? Are they happy, fired up and ready to kick-ass? Or are they de-motivated and don't really care?

Motivation comes from having shared goals and enjoying the experience in achieving them. If your team has low morale or poor staff satisfaction then they will not meet the goals set. So keep an eye on team motivation constantly and run "up-beat" workshops to get them excited about the next phase ahead.

Tip 5: Changes are the Death of Projects.

The biggest risk of the project is that the business wants to change the goalposts, the minute they are set. Seen this before?

How could you win a game of football, if the goalposts constantly change? The trick is to record every change that is requested and monitor the effects of those changes on the project. If they are likely to impact on the timescales, budget or our objectives, then tell the customer upfront and request more time, resources or budget in which to do it.

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And that is it, your five tips to monitor your projects.

Five Steps on How to Manage Your Tasks

Manage your tasks by taking these 5 simple steps...

Step 1: Consolidate

You probably have tasks written down on your desk, in your calendar, in documents and email and maybe even on your mobile phone. The first step is to consolidate all of these tasks into one simple list.

Make sure your task list is easily accessible because if it's not, then you'll end up with a splattering of tasks around your office within no time.

Step 2: Prioritize

With all of your tasks in one place, prioritize them by moving the most important tasks to the top and the least important to the bottom. In this way, you can work from top to bottom in your list knowing that you are always working on the right thing at the right time.

Make sure you prioritize your tasks based on the right criteria. Don't always put the easiest ones at the top. The "highest priority" tasks should be the ones that deliver the most value, are critical to the project or must be done before others can commence their work.

Step 3: Schedule

With a clear view of all of your tasks and their priorities, you now need to estimate how much time it's likely going to take to complete each task on the list. So write down the effort needed for each and try and make it as realistic as possible.

Then create a schedule so that you know which tasks you are going to work on and when. Having a schedule is great because it allows you and your team to forecast the workload ahead.

Step 4: Update

At the start of every day, update your schedule by marking the tasks you've completed and re-forecasting the tasks you still have ahead. Only then will you know if you're on track.

If your schedule gets out of date, it will quickly become useless. However by keeping it up-to-date, it will become a powerful tool as it will give you and your team a roadmap ahead.

Step 5: Communicate:

Your team will want to know what you are working on and when it's likely to be completed. So share your schedule with them, helping them to keep informed along the way.

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There you have it! five steps on how to manage your tasks

Five Methods 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.

1. **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.

2. **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.

3. **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.

4. **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.

5. **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.

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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.

Five Tips for Setting Project Priorities

Use the following questions to help you set your own project priorities:

Question #1 – Does the Project Bring in Revenue?

Companies are in business to make money. That's why everyone goes to great lengths to get as much done as possible with limited resources and short time frames. You can never go wrong with this question if you are struggling with setting project priorities. Choose the project to work on that will bring in revenue to the company if you have a choice to make. For example, there may be one phase of the project that needs to be complete in order to receive the next payment of 25%. Finish this project first before you move on to a new project that may not be as close to bringing cash into the company.

Question #2 – Will Closing this Project Create Client Noise?

Unfortunately, sometimes projects don't go as planned. This is bad enough when the project is an internal project, but it can really cause friction when the project is for a client. Dates may begin to slip or functionality may not work as intended. Clients can become frustrated and may begin getting a bit vocal. This gradual crescendo of discontent can quickly escalate to a full-blown roar if not carefully managed. Payment can start being withheld, VPs start getting involved, and meetings designed to reset expectations are necessary in order to get things back on track. These are the next types of projects you would move up in the queue to work on as you prioritize your projects.

Question #3 – Will Closing this Project Create Internal Noise?

This question is a variation of quieting client noise. Internal noise can be almost as bad as client noise and many times a bit more intense. It sounds like this... "I would be able to finish my deliverable, but I'm waiting on the specification that is running 8 weeks behind!" That particular deliverable is a project that you have been assigned to manage. This deliverable may not be complete for legitimate reasons (for example, limited resources, shifting priorities, changing scope) but it is being used as the poster child for why someone else internally is running behind. These are the next projects you want to tackle and bring to closure.

Question #4 – Is it a Strategic Project?

Now that you have projects that are bringing in revenue and the noise is down to a dull roar, you can focus on those projects that are strategic in nature. These are projects that will be introducing a new product, taking the company in a different direction, or supporting some other strategic initiative the company has defined. These types of projects are typically less crisis-oriented and longer term in nature. These can fit in nicely around paying client projects while these new projects gradually shift the direction of the company.

Question #5 – What's Left?

You are now down to the final question. What projects are left? These projects are typically pet projects from VPs and Executives that they would like to get done. They may not necessarily further the company's big picture, but they will make their department's job easier. Or, these may be projects that fall into the "nice-to-have" category but would not be considered mission critical.

There is one exception to the order of the questions above. Question #4 can quickly move to the top of the list depending upon the current state of the company. The company may be on the verge of going out of business because of offering antiquated or out-of-date products or services. Nothing else matters beyond changing the strategic direction of the company if this is

the case. Question #4 will rocket to the top of this list and everything else will become a lower priority.

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So the next time you hear they answer "they're all important", use the questions above to help you manage setting project priorities. You will quickly find that this process will become second nature and you will automatically be picking the next best project to work on!

Five 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 training 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 considering all the things 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 weigh-in 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.

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

Five Ways 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 teams 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 is 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 is working efficiently in completing tasks assigned to them.

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.

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Now you have the five ways to track your projects successfully you can do what is needed to complete your projects on time.

Five Steps to Deliver Projects on Time

On a project, it is easy to get bogged down with the details, and forget about the "helicopter view". Other than completing Project Status Reports at the end of each reporting period, many Project Managers adopt the approach that their own knowledge and experience alone will ensure that the project delivers on time.

So what are the steps that a Project Manager needs to complete to make sure that the project is delivered on time? We have listed them for you here...

Step 1: Plan to succeed

There is an old project saying: "Plan not to fail, don't fail to plan". By creating a detailed Project Plan with fixed delivery milestones that your customer agrees with, you will gain a firm basis for measuring the progress of the project.

Make sure that your plan includes delivery milestones every month where possible and that the Work Breakdown Structure is detailed enough to show all of the critical tasks that must be completed. Non-critical tasks can be re-scheduled later, but tasks which are on the critical path must be completed by the due dates specified.

Step 2: Clock the time spent

Almost every Project Manager these days has implemented Timesheets for tracking time. But how many actually record that time in a Time Sheet Register and update the Project Plan with the time spent per project task?

By doing this, you can allocate a set amount of time and effort to complete every task on the Project Plan, and easily identify when you are late. If staff spends more time than that allocated and the task is still not complete, then you will need to investigate why this has occurred and resolve the problems identified. This process is called the Time Management Process and it ensures that staff completes tasks where possible, in the timeframe allocated to them.

Step 3: Create a helicopter view

It is harder than it looks. To accurately monitor and report on the project at a helicopter level, you need a crystal clear picture of the project delivery against a schedule.

You need to know for every task in your project plan, whether it is under / on / over schedule and what the overall impact on the project is. You also need to have identified the critical path and determined whether the tasks on this path are on track.

Only with this detailed knowledge can you gain a sufficient "helicopter view" to be able to report accurately to your Project Board or Sponsor. Remember, by keeping your sponsor accurately informed of the project progress, you will ensure their full support.

Step 4: Going "Belly Up"

So you have done all this but your project is going "belly up" (i.e. slipping). What then? Well the first step is to investigate the reasons why. It may be that the scope of the project has grown from that originally agreed, or you have encountered complexities that were not identified when you started, or that the plan was too aggressive in the first place.

Regardless, you need to 1) Stop 2) Investigate 3) Resolve 4) Report. To resolve the problem, you may need to formally redefine the scope of the project, hire additional resources to help out, or agree with the customer on a new delivery timeframe. You will also need to update the

Project Plan with any additional tasks required to fix the problems, and then you will need to report on the new status to your Sponsor.

Step 5: Getting the right mix

Almost every project team will encounter unforeseen changes, risks and issues. Your level of success will depend on how you manage these when they arise. By implementing these project processes below, you can ensure that your mix of changes, risks and issues are easily manageable:

• Change Management Process

• Risk Management Process

• Issue Management Process

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All Project Managers need to complete some basic steps throughout the project to make sure that it is "on track", otherwise it is easy for a project to go off the rails.

Five Ways to Save Time on Projects

The more time you save at the beginning of your project, the more time you'll have left at the end. So check out these five top tips:

1. **Look at Dependent Tasks**

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.If you have linked tasks in your plan with a finish-to-start relationship, then think about whether you really need to wait until the first task finishes, or if there is an opportunity to move forward with the second task early.

For example, if you have two tasks called "write requirements" and "design solution" and they are linked in your plan, then do you really have to wait until 100% of the requirements are written before you can begin designing the solution? Maybe you can start the overall design when the requirements are 80% finished. If that's the case then the overall elapsed time for the project will be shorter.

2. **Get Rid of Unnecessary Tasks**

When you first write your plan, you'll be writing a task list under the impression that everything is achievable, so you'll include all of the tasks you can think of that might need to be included to deliver your project. However as the project progresses, things change and you'll become time constrained. It's then that you need to review the list of tasks in your plan and cull anything that isn't absolutely necessary to deliver as part of the project. Some of those "nice to haves" will have to go.

By the way, you don't have to delete the task - but instead just move it to a "Post Project Completion" phase so that once the project is complete, you have some odds and ends to tidy up. This will save you time and make sure that what's delivered is the real "meat on the bones" and not the necessarily the whipped cream on the top!

3. **Add More Resources**

Are there tasks or deliverables that anyone can do without specialized training? Can you add more people without tripping over each other? If so, then bring in more people and delegate those non-specialized tasks to them-it will save you considerable amounts of time.

4. **Outsource Where You Can**

If you have confidence in a third party to get the work done, outsourcing part of the project can be a huge timesaver. You might outsource to an external organization, independent contractors or even another department. Just make sure that they take responsibility for the work you give them and include them as though they are a core part of your team. Make them feel loved and don't treat them differently to your full timers and you'll get a lot more out of them.

5. **Help Your Team Save Time**

Watch everything your team do and where you see inefficiency, help them improve to save time. Also, teach them to delegate their tasks to others, so that they can work smart with their time.

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Give them the right tools they need to do the job quickly. React to their needs immediately and make sure they are never "waiting on you" to do their job. If you give your team the right direction, support and tools, they will save you time on projects and make your job easier!

Five Tips for Improving your Time Management

On projects, time is the most sacred resource. It's limited, that's why it's a "project" as opposed to "operational" work which is on-going. So it's imperative that you have good time management skills to cope with the volume of work ahead. Here are five tips to help you manage your time better than before:

Tip 1: Get rid of the clutter

There's an old saying and it goes like this: "a busy desk makes a busy mind". As a Project Manager, you don't want a busy mind. You want a clear mind that remains sharp throughout the day. So start clearing your mind by clearing your desk and office space. Make it paperless if possible. You will feel refreshed, focused and sharper than before.

Tip 2: Ban the Post-its!

Do you have tons of post-it notes that are constant reminders of things to be done? And when they're important, you stick them to your monitor? Many people do it, but it's not good time management. The reason why is that it's pretty hard to prioritize 20 post-it notes, so you end up only working on the ones that are in front of you rather than the ones that are the most critical to the success of your project.

Collate all of the post-it notes from your desk, car and pockets and create a single "To Do" list in Microsoft Excel. Then bin the post it notes. You will end up with a clear desk and a single list of things to do. That's a great start towards proper time management.

Tip 3: Who shouts loudest

People with poor time management skills adopt the "who shouts loudest" principle. Those who shout loudest get their work done first. But if you have a single To-Do list and you've prioritized your work accordingly, then you'll always follow the priorities in your list, and not those coming from people in emails, phone calls and text messages. Suddenly you're the one who determines what gets done and when, not others.

Tip 4: Create a work schedule

Now you have a clean desk and a single To-Do list. You're now ready to create a work schedule. Look at the month ahead and plan your time carefully. Make sure that the important items are scheduled to be done first. Never fill your calendar more than 80%, so that you're available when unexpected tasks crop up.

Tip 5: Stick to it

It's hard, but stick to it. Keep your desk clear. Keep a single To-Do list and update it daily. And if you have more than 5 post-it notes on your desk, then you know you're getting back into clutter. Keep a focused mind and work smart using these simple but effective time management tips.

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Now these tips will assist you in improving your time management.

Five Options to get Projects back-on-track

Whether you project's suffering from cost overruns or delays, it's likely that it's because:

- The initial schedule was a little too optimistic

- The project was under-resourced from the outset

- There was insufficient funding allocated to the project

- The customer has changed the scope during the project

- New risks and issues are impacted on the project.

So what do you do if your project has experienced these problems and it's starting to "veer off the track" ? We suggest that you take one or more of the following steps:

Option 1: Re-schedule

At the start of the project you will have agreed to deliver the project within a fixed schedule. If this schedule is no longer achievable, then you're best to raise it with your customer as soon as possible and get them to agree to a new delivery schedule which is more achievable.

Do this by creating a new forecast in your Project Plan and then once you gain approval, "baseline" your plan so that the new delivery schedule is fixed. You will only want to reschedule once during the project life cycle, otherwise you'll be sending an implicit message to your team that late delivery is acceptable.

Option 2: Gear up

If you have sufficient budget in your Financial Plan but insufficient resources, then you need to apply more people, equipment or materials to complete the tasks laid out in your Project Plan. You can seek additional resource from; within your business, external recruitment, hiring contractors or appointing suppliers as required.

But what if you're under-resourced and you don't have the funding available to appoint more resource? Then, you only have 2 options: a) Find the money, or b) Improve the efficiency of your staff. In most cases, you'll need to improve the efficiency of your staff, so that they can complete more tasks with the timeframe and budget available.

See our prior newsletter "How to boost your teams performance" for tips on improving staff efficiency. Email us if you'd like us to email it to you.

Option 3: Find the money

"Anything can be done with money". So the first step is to present a Business Case to your Sponsor for additional funds for the completion of the project. But in most cases, the funds aren't available and the original budget that was set is fixed in concrete. So in this case, you need to find money from the existing budget. You will need to carefully analyze your existing budget and your expenditure to date and identify efficiencies.

As with most projects, a large percentage of the cost is spent on people. You may need to reduce your administration staff, negotiate new rates for the supply of services or impose penalties in suppliers for overspending or late delivery. In most projects, you can save 10-15% of the cost of the project (especially is a little contingency was added at the start) by cutting back on staff costs, giving you the cash flow you need to deliver within budget.

Option 4: Reset the scope

During the life of a project it's easy to forget what the exact scope of the project was originally, as defined in the Terms of Reference. So inevitably the customer's needs change and the scope of the project widens, until the budget and schedule are impacted.

If this happens, you have two choices—revert back to the original scope or agree to a new scope. The best option is usually to revert back to the original scope, as by doing that you will immediately relieve any pressure on your schedule and budget. But if you choose to set a new scope, and then make sure it's properly documented and formally approved with your customer.

One quick tip is that if your scope widens from that originally set—it's the perfect opportunity to ask your customer for more time, funding or resources to complete it. If you don't do this, then delivering a wider scope based on the original budget and schedule will put pressure on your project team to deliver more, inevitably causing a reduction in the quality of their deliverables and a greater staff turnover.

Every time your customer requests a change in scope, renegotiate a new schedule, budget and resource allocation. Or you can just say "no" of course!

Option 5: Carefully manage risks

Your project may be operating within the original scope, budget and schedule set—but new risks and items may prevent your successful delivery. Could these problems have been foreseen and were they managed quickly as soon as they were identified?

You really need to implement a formal risk management process and issue management process. These processes will help you identify risks early on, and take the steps needed to mitigate them. They will also give you procedures for identifying and resolving project issues, before they impact on the project delivery.

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By taking these steps to manage your schedule, budget, resources, scope, risks and issues, you will be able to put your project back on track and ensure you deliver within the budget and schedule agreed with your customer, thereby achieving true project management success.

Five Tips for Leveling your Resources

It's easy enough using tools like Microsoft Project, to create a Project Plan and allocate resources against it. But how do you make sure that each resource has an amount of work allocated which exactly matches the amount of time they have available, i.e. how do you know they are not under or over loaded? We've described five generic tips for doing it yourself...

1. Create a Bullet Proof Plan

The first step is to create a Work Breakdown Structure that includes ALL phases, activities and tasks. The worst thing you can do is to level your resources and then find that you've missed critical tasks in your plan and have to start again. Once your task list is complete, list all resources that are allocated to the project. Only with a complete list of tasks and resources are you truly ready to level your resources.

2. Start with Critical Tasks

Now, identify the most critical tasks in your plan and calculate the amount of effort required to complete them. Then allocate your best resources to completing these tasks and make sure that the effort allocated is sufficient.

3. Perform Leveling

Great - so every critical task has the resources needed to complete it. But in doing this, were any of your resources over-allocated? For instance, is Bob Smith allocated for 60 hours a week instead of 40? The process of reallocating people against tasks to even out their workload, is called "resource leveling" To do it, take these steps:

- Identify the number of hours that each person in your team has available for work.

- Calculate the number of hours they are allocated to tasks, in your plan.

- If the number of hours allocated is greater than the number of hours they have available, then they are "over-allocated". If it's the reverse, then they are "under-allocated".

- For any resources under or over allocated, you need to change the tasks they are allocated to, in order to try and perfectly fit their available hours against their allocated hours.

Only when you've completed this, are resources considered as "leveled".

4. Tackle Non-Critical Tasks

It's now time to perform all of the above steps for your non-critical tasks. This is a time consuming process, but by starting with your critical tasks first and your non-critical tasks second, you know that the project has a great chance of succeeding.

5. Constant Surveillance

Your Project Plan is a living and breathing document. It changes every time you complete a new task or finish an old one. You need to constantly monitor your resource utilization and make sure that your team is allocated to tasks in the most efficient manner. .

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Those are the five tips to leveling your resources. Now it is time to put them in action.

Six Procedures to Performing a Stage-Gate Review

A Stage-Gate is a checkpoint at the end of each phase in a project to ensure that the project has achieved its objectives and deliverables as planned. To ensure that the project is ready to proceed to the next phase, a Stage-Gate Review is performed. The review involves documenting the current status of the project and issuing a request to the Project Sponsor to proceed with the next phase of the project.

Stage-Gate Reviews are completed at the end of the following project phases: Project Initiation, Project Planning and Project Execution. It is not necessary to complete a Stage-Gate Review Form at the end of the Project Closure phase, as approval to close the project is covered within the 'Project Closure Report'.

Before you initiate a Stage-Gate Review, you should first check that all of the activities listed in the Project Plan (for the current phase of the project) are 100% complete and the project is now ready for review. Then perform the following review procedures:

1. **Review the Schedule**

To determine whether the activities within the current phase were completed on time and that any task slippage is adequately documented. You should not only compare the actual completion dates to the forecast completion dates, but you should also identify the ability of the project to deliver against the baseline completion dates specified in the Terms of Reference for the project. As a general rule of thumb, if the actual completion dates are within 10% of the baseline dates, then you have a reasonably high chance of delivering the overall project 'on time'.

2. **Review the Expenses**

To identify the current expenditure of the project to date vs. the planned expenditure listed in the Financial Plan for the project. This should include all capital and operational expenditure listed in the Financial Plan, as well as any unplanned expenditure which has accrued during the project to date. As a general rule of thumb, if the project is currently within 10% of the original budgeted expenditure, then you have a reasonably high likelihood of delivering the overall project 'to cost'.

3. **Review the Deliverables**

To ensure that all deliverables listed in the Project Plan have been delivered on time and are to the level of quality expected by the customer. List all of the outstanding deliverables by identifying any deliverables which were planned to be complete prior to this review, but are still in progress.

4. **Review the Risks**

In the Risk Register to ensure that you have a clear action plan for mitigating all medium and high priority risks. Each risk identified should have already been reviewed and a clear set of 'mitigating actions' assigned.

5. **Review the Issues**

In the Issues Register to make sure that each issue identified has been resolved within the planned timeframe. Any outstanding issues should be identified and a clear plan for mitigating the issue should be formulated.

6. **Complete a Stage-Gate Review Form**

Which outlines the results of the Stage-Gate Review? The Project Manager will usually complete the form and present the current status of the project to the Project Board for consideration. The Project Board (chaired by the Project Sponsor) may decide to cancel the project, perform further work within the existing project phase or grant approval to proceed with the next phase of the project.

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Conducting formal Stage-Gate Reviews are an important part of any Project Lifecycle as they provide a regular detailed assessment of the project to date and allow the Project Sponsor to understand (and act on) the overall status of the project at each key milestone.

Seven Ways to Turning around Failing Projects

1. Confirmation

The first thing to do is to find the documented vision for the project, go to the Sponsor and confirm that it's still accurate. If there is no vision, then you need to create one pretty darned quickly. Identify the key project stakeholders and get them to agree on exactly what the project must achieve, by when and whom for. Only with a solid vision will you have a clear stake in the ground from which to move forward.

2. Review

Next, you need to find out what's going on. Why is the team unhappy? Why is everything late etc. Identify the top 10 things that need to be fixed to get the project back on track. Don't look back, only look forward.

Don't do a post mortem. Instead make it a short, sharp review that identifies the key issues affecting the project. Involve your team as much as possible, as you need their buy-in.

3. Quick Wins

You need to build confidence with your Sponsor and more importantly, your team. Choose a couple of issues that you know you can solve immediately, and once solved, communicate it to your team.

4. Plan of Attack

Only now, will you have a good feel for the project issues and what it will take to resolve them. You can now create a plan of attack. Identify the actions to be taken by all of the team, to deliver the project vision successfully. We say "all" of the team, as you need to gain the buy-in of your entire team to get the show on the road.

Then take your plan to your Sponsor and get their support. Don't be afraid to ask for more money, time or resource as this is the time to ask for it. If you ask now while you're fresh in the role, it won't reflect on you. Don't wait until you're near the end of the project before you ask.

5. Rally

With your Project Sponsors support, get the project team together, for a single communications event. Tell them what you've found, what needs to be fixed and how you plan to do it. Tell them about the quick wins that have already been made and how you know that if everyone focuses on the plan ahead, you can deliver successfully.

6. Milestones

Set clear milestones that everyone understands. Put the milestones and plan of attack on a wall chart to make them visible. Then meet regularly to discuss their progress.

7. Love, Hugs and Tears

Then love your high performing staff, hug your underperformers who show promise, and shed no tears at having to change staff that shows no sign of buying in to your action plan. It's onwards and upwards!

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By using these seven ways you should be able to turn a failing project around in no time.

Nine Critical Processes to Monitor and Control Your Projects

After you've started up and planned your projects, you'll move into the Execution (or "delivery") phase in the project life cycle.

This is typically the longest phase in the project, since it is in this phase that the physical deliverables are built for the customer. Whether your project is to build a construction complex, computer system or land a space vehicle on mars, you will need to very carefully monitor progress and control delivery. Otherwise, your project could go off the rails.

So to monitor and control delivery, you need to implement 9 critical project management processes. We'll describe the first 3 processes here, and in the next newsletter we'll cover the remaining 6 critical processes or you.

Critical Process #1: Time Management

Every Project Manager knows that the customer expects their project to be delivered "on time". But how many Project Managers actually record every hour spent by staff on the project?

To ensure on-time delivery, that's what you need to do: implement a time management process. This process will help you to monitor the time spent by all of the members of your team, so that you can control how time is spent.

It's not just about "having great time management skills" either, it's about putting in place a process for recording time spent by staff by using timesheets and recording that time against the project plan.

That way, you can create an accurate picture of the current status of the project to determine whether or not it is likely to finish under / on / over the time allotted.

Critical Process #2: Cost Management

Few Project Managers can tell you for every day of the project, exactly how much of their budget they have spent to date. The reason is that many of the project costs are often difficult to track, especially when they relate to the use of equipment and consumption of materials.

But to deliver you project within budget, you need to monitor and control all of the costs that accrue, on a very regular basis. You can do this by implementing a cost management process.

Cost Management is all about accurately recording project expenses, as they occur. By using Expense Forms and an Expense Register, you can monitor all project costs and control expenditure when unplanned expenses arise. You don't need to be an accountant, you just need to keep an eye on the overall project expenditure on a weekly basis and act quickly when any issues arise.

Critical Process #3: Quality Management

It's often said that the hardest thing to monitor is "quality". Most Project Managers find it difficult to determine exactly what the customer expects in terms of deliverable "quality", let alone measure the actual levels of quality achieved. But you must try.

To do this properly, you need to implement a Quality Management Process. By following this process, you can set quality targets to be achieved and gain agreement from your customer.

Then you can use Quality Assurance and Quality Control techniques to monitor and control the actual quality of your project deliverables. If your quality levels drop below the targets set, then you can take action to rectify it. By constantly reviewing quality levels and ensuring that they

always meet the target, you can feel confident that your customer will sign off your project as complete, once all of the deliverables have been produced.

Critical Process #4: Monitor Change

The most typical cause of a project going off-the-rails is that the scope has grown out of control, by "osmosis". The client has asked for changes, the team have had new ideas and your nice neat set of project tasks now look like spaghetti.

To succeed, you need to keep tight control of your project scope, by being vigilant about change. Do this by implementing a change management process. As soon as you identify a request for change in your project, document it formally by specifying where the change has come from, why it's needed and its impact on your project objectives.

And if the change is likely to affect the target end dates, budget or deliverables, then get your sponsor and customers approval before implementing it. Don't be afraid to ask for more time, people or money if you need it, especially if the change was initiated by the customer.

Never allow change to run your project. Instead, run your project by managing change!

Critical Process #5: Control Risks

As a Project Manager, it's all too easy to roll your sleeves up and get stuck into the project delivery. But when you do this, it's often hard to keep your head above water. You may end up managing at the micro level and high level risks to the project may pass you by.

It's hard, but tries and remains a little divorced from the detailed day-to-day operation of your project where possible. In this way, you can continually assess the overall risk to the project from the outside and pounce on new risks when they appear.

Also, implement a Risk Management Process to formalize the way that risks are identified, assessed and mitigated. For each risk that appears, quantify its potential impact on the project, then take immediate action to minimize the likelihood of it occurring. Always create contingency plans, so that if the risk does occur, you can go to "plan b" and minimize its effect on the project delivery.

Critical Process #6: Resolve Issues

Resolving issues sounds easy, right? The challenge however, is not just in resolving every issue that turns your way, but instead monitoring all of the issues that occur on a project and only resolving issues that are likely to impact on the project outcome. It's very infrequent on a project that you'll have time to resolve every issue that crops up - so be picky.

To make sure that you resolve issues in a timely manner, you need to put in place an Issue Management Process. This helps you to review all of the issues that crop up, assess their impact, delegate the ones that can be handled by others and resolve those that are critical to the project.

Critical Process #7: Managing Suppliers

Always, make sure you appoint suppliers through a formal process. Even if you're appointing suppliers you know and have worked with for some time, always create a statement of work which defines the exact scope of work that you wish them to perform.

Next create a formal detailed supplier contract for the scope of work to be completed. In this contract, define the work to be completed, the responsibilities of parties, the performance criteria and terms and conditions for the relationship. Then if things go sour, you have something to fall back on.

In your contract, have milestones which specify what it is that you expect them to have delivered and by when. Then at each milestone date, complete a formal review of deliverables completed to date, vs. the deliverables specified in the contract. If things change during the project, then amend the contract accordingly. The contract should always represent the nature of the agreement and never become "out dated".

You can then closely monitor and control your supplier's performance.

Critical Process #8: Control Procurement

As well as managing your suppliers overall performance, you also need to monitor and control the procurement of goods and services from those suppliers.

Controlling procurement is all about reviewing and accepting goods and services once they have been delivered by your supplier. You need to implement a Procurement Management Process which enables your team to take ownership of the item being delivered, review it against pre-defined criteria and approve payment for it, based on your supplier contract.

Tip: Always make sure that you issue Purchase Orders for products you require from suppliers. Create a detailed description of the product you require on the Purchase Order, so that you have something to measure against when it arrives.

Critical Process #9: Perform Communications

Communication is King! As part of the "monitor and control" phase in a project, you'll need to keep a constant eye on the communications that are taking place.

You should always have a formal Communications Plan in place so that key messages are communicated to the right people at the right time. You can then monitor and control your project communications by making sure that the activities on your communications plan are completed at the right time, and in the right manner.

Make sure you have a feedback process so that if the wrong messages are received by staff, suppliers or stakeholders, then you'll be immediately informed and can take action to resolve it.

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So that's it - how to monitor and control your project by managing:

- Time, Cost and Quality

- Change, Risks, and Issues

- Suppliers, Procurement and Communications

By using these nine key project management principles, you can deliver projects quickly and efficiently, with less stress and effort than before.

Build and Manage Project Budget

Three Critical Steps to Managing Project Costs

To manage costs effectively for your project, you will want to implement a Cost Management Process. Cost Management is the process of monitoring and controlling costs (i.e. expenses) within a project. By recording and monitoring the day-to-day costs, you can:

- Calculate the total cost of performing project tasks

- Determine the total cost of staff in the project

- Monitor the total actual cost vs. forecast cost

- Easily identify current and potential cost overruns

Cost Management is comprised of a set of processes, roles and documents for monitoring and controlling the costs within the project. Some examples of cost types include:

- Labor (staff, suppliers, contractors and consultants)

- Equipment (computers, furniture, facilities, machinery)

- Materials (consumables, engineering materials, water, power)

- Administration (legal, insurance, lending and accounting)

There are three critical steps to managing project costs effectively. We've described them here for you:

Step 1: Document Expense

The first step is to identify the actual costs incurred on the project, by using Expense Forms. All managers, team members, staff and contractors should complete Expense Forms whenever they incur a project expense. Expense Forms allows team members to record the:

- Date upon which the expense occurred

- Activities against which the expense was incurred

- Type of the expense which took place

- Expense amount and payee to whom payment is made

- Invoice details relating to the expense

Step 2: Approve Expense

The Project Manager then receives the Expense Forms and they review them to determine whether the expense:

- is related to a valid project task

- was budgeted for, in the Financial Plan

- is unbudgeted but fair, reasonable and affordable

Based on this assessment, the Project Manager will decide to either:

- Approve the Expense Form and arrange payment

- Request further information regarding the expense

- Decline the expense and raise an expense issue

In most cases the Project Manager has the authority to approve all budgeted expenditure; however unbudgeted expenditure over a certain limit may require the approval of the Project Sponsor.

Step 3: Update Project Plan

Following expense approval, the payment of the expense is scheduled. The payment details are then recorded in an Expense Register. During the Cost Management Process the Project Administrator keeps this register up-to-date. On a regular basis (typically weekly), the Project Administrator also updates the Project Plan with the information provided by the Expense Register, in order to:

- Identify the total cost of each project resource and task

- Calculate the total actual vs. budgeted cost of the project

- Identify any instances of under or over spending

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And there you are. By taking these three simple steps, you can substantially improve your cost management processes, helping you to deliver your project within budget.

Four Steps to Creating a Project "Financial Plan"

The following diagram depicts the activities taken during the Project Planning phase:

A Financial Plan is created to identify the quantity of money required for each stage in the project. The total cost of labor, equipment and materials is quantified and an expense schedule is defined which provides the Project Manager with an understanding of the forecast spending vs. the actual spending throughout the project. A typical Financial Plan should:

1. List the types of costs to be incurred on the project such as labor, equipment, materials and administration costs

2. Identify the cost per unit for each cost type

3. Identify when each of the costs will be incurred by completing a Cost Schedule

4. Identify the cost per activity by completing a Cost Usage table.

This is a key document created during this phase is the Financial Plan.

Four Steps to Implement a Project Financial Plan

Early in the Project Planning phase, you will need to define the overall budget for the project implementation. However setting a budget isn't an easy task. In fact, many experienced Project Managers would say that it's more of an Art rather than a Science! As challenging as it is, there are 4 steps you can take to create an accurate and realistic budget, by documenting a project "Financial Plan":

List the Financial Expenses	→	Quantify the Financial Expenses	→	Construct an Expense Schedule	→	Define the Financial Process
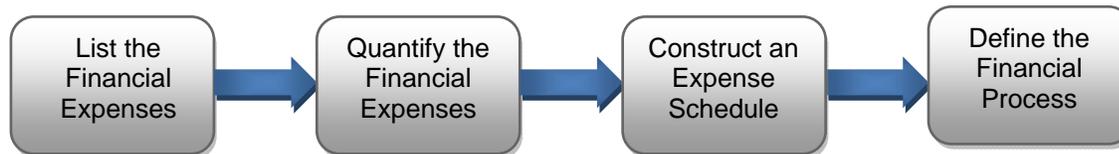
Step 1: List the Financial Expenses

The first step taken when defining a Financial Plan and setting a project budget, is to identify all of the types of expenses that are likely to be incurred throughout the Project Lifecycle.

Typically, most projects spend the majority of their budget on purchasing, leasing, renting or contracting the resources to the project (e.g. labor, equipment and materials). However other types of expenses incurred may include those related to the:

- Procurement of resources from suppliers
- Establishment of a Project Office
- Administration of the project

Step 2: Quantify the Financial Expenses

Once you have identified a detailed list of expenses to be incurred throughout the project, the next step is to forecast the unit cost of each expense type listed. The unit cost is simply the cost of a single unit of a particular expense item. For instance, the unit cost for:

- Labor may be calculated as the cost per hour supplied
- Equipment may be calculated as the rental cost per day
- Materials may be calculated as the purchase cost per quantity

After listing the unit costs, you should calculate the total amount of each expense item needed to complete the project. For instance:

- Identify the number of roles required
- Quantify the items of equipment needed
- Determine the amount of materials required
- Quantify the procurement items to be sourced from suppliers
- Calculate the administration costs the project

Step 3: Construct an Expense Schedule

You have now collated all the information needed to build a detailed expense schedule. This schedule enables the Project Manager to calculate the total cost of the project on a daily, weekly or monthly basis.

To create an Expense Schedule, build a table which lists all of the expense types down the left hand side of page, and all of the weeks in the year across the page. Then identify for each week and for each expense type, the amount of financial expenditure to budget. Once complete, you can sum up all of the expenses for any particular week to gain a weekly budget for the entire project.

Of course you may wish to calculate a daily, monthly or yearly view, based on your particular project need. Also don't forget to list any assumptions made during the creation of this Financial Plan. For example, it may be assumed that:

- "The project delivery dates will not change during this project."

- "The unit costs forecast are accurate to within 5%."

- "The funds listed by this plan will be available as required."

And finally, list any constraints identified during this financial planning process. For example:

- "Limited information was available when identifying costs"

- "A market shortage has resulted in a high labor costs"

Step 4: Define the Financial Process

Now that you have created a detailed Expense Schedule, you need to define the process for monitoring and controlling expenses (i.e. costs) throughout the Project Lifecycle. Define the Cost Management Process for your project by documenting the:

- Purpose of the process

- Steps involved in performing the process

- Roles and responsibilities involved in performing the process

- Templates used to support the process

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There you have it! By completing the four steps listed above, you will be able to create a comprehensive Financial Plan for your project and ensure that you consistently produce project deliverables within budget.

Five Steps to Manage Your Project Finances

Step 1: Set the Budget

The first step towards managing your project finances is to set a budget. This isn't as easy as it sounds. You need to forecast the total amount of people, equipment, materials and other expenses, needed to deliver the project. You then need to work out when in the project plan, these expenses will take place. By doing this, you can get a picture of your "project cash flow" which tells you the amount of money you need for every week in the project.

Step 2: Backup Funding

Before you need it, find backup funding in the business. This is additional funding that can be used to deliver your project, if you need it. Few Project Managers actually do this in advance, but if you have almost completed a major deliverable and you suddenly run out of money, then that backup funding might "make or break" the project. You are always in a better position to get backup funding before you need it, rather than asking for more cash when you've already overspent. Get backup funding as early in the Project Life Cycle as possible. It will be sure to reduce your stress.

Step 3: Weekly Tracking

The next step after setting your budget and securing backup funding is to start tracking your daily spends on the project. You need to track every expense that occurs. Ask your team to complete expense forms and submit them to you for approval. If you can get your team to wait until you have approved an expense before it is incurred, then you can more easily control expenditure on the project. Next, you need to track your people expenses. The total cost of the hours taken by those people is automatically shown on the Project Dashboard, so you can see whether your people cost is under or over budget.

Step 4: Realignment

When you start spending more than your budget, you have 3 options available to help you stay within budget:

- Re-forecast your expenses and present a new budget to your Sponsor for approval.

- Start reducing costs immediately. This means spending less to get the same job done. Or alternatively, see if your Sponsor will agree to a reduced scope, so that you have less to produce for them.

- Start using your backup funding to get you through the crux of the project.

Step 5: Cash flow Management

Make sure you always have enough funds available to cover your spending over the months ahead. Cash flow management is about managing the cash needed to deliver your project. So make sure your Sponsor has approved the next 1-2 months of work ahead of time, and that the funds needed to manage the project have been made available. Then track the spending of that funding every week.

Four Ways to Measure Progress against Budget

A "project" by definition will always have a limited timeframe and a fixed budget. The "budget" is the amount of money that the Project Sponsor is willing to spend to achieve the project objectives. So here are some tips and hints on setting your budget and measuring progress against it.

1. **Don't fix it in concrete**

Your first job as a Project Manager is to ask your Sponsor "So how long have I got and what's the budget?". Your next job is often to ask for more time and money to boost your chances in succeeding.

You can do this by writing a Business Case, Feasibility Study and Project Charter to show your Project Sponsor that you will need more money than that identified to date, to meet the project objectives. When you have agreed on an amount that you believe is adequate, ask them to "fix this amount as a budget, but make available another 10-20% as contingency". That way, your budget isn't fixed in concrete.

2. **Planning ahead**

Right at the outset, create a Financial Plan so that you have a detailed view of all of the expenses that are going to arise and when they will be incurred. If you haven't done it already, complete a Project Plan so that you know the cost of every task to be completed.

In this way, you know for every week in the project the amount of money that will be consumed. Make sure that the amounts in your Financial Plan and Project Plan align with the budget set. That way, you know that you have a good chance of delivering within budget from the outset.

3. **Setting out**

From the minute you've set the budget, you need to start recording the actual cost of the project. This includes the actual cost of your time, your staff, contractors, equipment and materials. If you're using internal staff, then assign a standard rate to the hourly cost of these resources and ask them to complete a Timesheet so you know how many hours they are spending on the project.

If you don't have a financial system, then use a spreadsheet to record the daily cost of the project. If you want to get specific, then also record the costs against the tasks in your project plan. By accurately recording the project costs throughout the entire project, you will be able to ensure you keep on track.

4. **Keeping on track**

To check whether you're on track, monitor your actual costs vs. your planned costs and identify any deviations. If you're always under your planned weekly cost, then you're likely to deliver your project under budget. It's that simple!

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Method123 (www.Method123.com) and the Template Collective (www.TemplateCollective.com) offer templates to help you manage progress against budget.

Seven Tips to Get Your Project Back Under Budget

If you have a set budget for your project and you're currently exceeding it, then it's unlikely that you'll get it back under budget unless you do something about it. So here are 7 tips to help you do just that:

1. **Take a helicopter view**

First summarize all of the expenditure on your project to date vs. the expenditure you planned at the start. Then quantify the amount you have exceeded your budget by. If you're more than 10% over budget in total, then you need to take action.

2. **Review spend**

Next, review your actual spend vs. planned spend per week. Have you always been spending more money than you had budgeted, or is it only in the last few weeks? Then narrow down the cause of the problem. Was it that your budget was flawed, or have you experienced problems that were unexpected?

3. **Lower resources**

Now take the first step towards saving costs by determining whether you can use cheaper suppliers, equipment or materials. These types of costs usually consume a lot of your budget, so it's worth reviewing them in detail. You can also save money by reducing the number of contract or administrative staff assigned to the project.

4. **Reduce scope**

The best way to save money is by reducing the scope of the project. Identify deliverables that you believe are non-critical to the project and negotiate with your customer to remove them from scope.

5. **Monitor changes**

One place that unbudgeted spend usually occurs is in the area of change control. Review the entire project changes currently requested and only approve those requests which are absolutely necessary from this point onwards.

6. **Minimize tasks**

You may also be able to save costs by removing non-critical tasks from the project plan. Typically, Project Managers can save 10-15% of their budget by removing tasks that aren't critical.

7. **Boost efficiency**

Motivate your team and they will complete more tasks within the same period of time. This will save you a percentage of staffing costs, which are usually one of the largest cost areas of a Project Manager's budget.

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By taking these tips seriously, you will be able to reduce project costs and ensure that you deliver successfully under budget.

Ten Tips to Manage Projects Within Budget

Every Project Manager has a fixed budget. It is one of those things that makes a "project" a project. If you had an on-going annual budget, then you would be managing an operational activity, not a project.

The budgeting challenge for a Project Manager is that often by the time that they are allocated to a project, the budget has already been set by the Sponsor. The Project Manager does not have any real "say" in the matter. So how to can you manage your project within budget, when you have not created the budget in the first place? Here are 10 top tips on how...

Tip 1: Revise the budget

As soon as you are allocated to a project, make it one of your first jobs to revise the budget set. Even if the budget has not formally been set, the Project Sponsor will have some ideas on the overall amount of budget available for use. If you think that the budget is insufficient, tell your Sponsor as early as possible.

Tip 2: Create a Financial Plan

Whether a budget already exists of not, your next step is to create a detailed Financial Plan for your project. This plan will set out all of the planned expenses and when they are likely to occur. Make sure that your Sponsor accepts your plan and that you are comfortable that you can deliver the project against it.

Tip 3: Baseline the plan

Right, so you are now managing the project against a detailed Financial Plan, not a loose budget or general guide on what should be spent. You have a detailed view of the forecast project costs, against which to measure project progress. You should now baseline the plan by getting your Sponsors endorsement and communicating it to your team leaders.

Tip 4: The plan is the plan

Many people manage their project against the total amount of expenditure available. Do not fall into this trap, as you will always think you have enough funds to complete the project. Instead, manage the project against the detailed Financial Plan you have set out. If some items go over budget, investigate why and fix the issues. Only by managing at this level of detail can you build an accurate view of the projects performance against budget.

Tip 5: Get serious

If you are serious about delivering your projects within budget, then you need to implement some form of Cost Management Process. This process will give you formal procedures for the identification, recording and tracking of project costs.

Tip 6: Use Expense Forms

Ensure that your staff record all expenses using Expense Forms. Only by formally recording expenses can you build an accurate picture of the overall cost of the project to date.

Tip 7: Register your expenses

By using an Expense Register or log, you can create a summarized view of the project cost to date, at any point in time.

Tip 8: Report progress

We have seen some Project Managers tell their Sponsor that they are likely to be over budget the week before they were due to finish! If you even have an inkling that you might be over budget, tell your Project Sponsor about it as early as possible. It will help you gain buy in and they may even be able to help you out.

Tip 9: Do not be afraid

If you need more money and you have exhausted all other options, then ask for it. Do not be afraid to tell your Project Sponsor that you have reached this point. Remember, there are quite often very valid reasons for needing more money throughout the project.

Tip 10: Balance time, cost and quality evenly

Remember, your goal is to deliver the project on time, to cost and quality. Never compromise time and quality to bring your project in under budget. It is a challenging job, but always try and balance time, cost and quality fairly. You can do it!

Manage Issues

Three Steps to Project Issue Management

Issue Management is the process of identifying and resolving issues within a project. By quickly and efficiently managing issues, you can:

- Limit the effects of unforeseen events on the project

- Reduce the time spent administering project issues

- Greatly improve your chances of project success

You can complete the Issue Management Process by taking 3 simple steps:

Step 1: Identify the Issue

Any member of the project team may identify a new project issue. An Issue Form is completed to describe the issue and rate its current impact on the project. The actions required to resolve the issue are also identified.

Step 2: Review the Issue

The Issue Form is then forwarded to the Project Manager, who investigates the issue and determines the overall issue priority. The priority of the issue is determined by its current impact on the project's ability to achieve its stated objectives. If the issue is severely impacting the project, then it is assigned a high priority rating and forwarded to the Project Board for review.

When determining the issue priority, the Project Manager considers whether the:

- Deliverables listed in the Terms of Reference are currently being affected by the issue

- Quality Targets specified in the Quality Plan are currently being affected by the issue

- Timeframes specified in the Project Plan are currently being affected by the issue

- Resources specified in the Resource Plan are currently being affected by the issue

- Budget specified in the Financial Plan is currently being affected by the issue

If the Project Manager believes this is not a high priority issue but it should still be acted on immediately, he or she will implement a suite of actions to resolve the issue quickly and efficiently.

Step 3: Assign Issue Actions

The Project Board reviews all high priority issues by considering the current impact of each issue on the project. It may then decide to:

- Ignore the issue, as Board members believe it is not impacting the project

- Validate the issue and request further information that is needed to make a decision

- Decide on a suite of actions to resolve the issue

The Project Manager is then responsible for scheduling and implementing these actions and reviewing the issue on a regular basis to ensure that it has been resolved accordingly. Throughout the Issue Management Process, the Project Manager can monitor and control issues impacting the project by keeping the Issue Register up-to-date.

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By completing these three steps for each issue that arises, you will be able to minimize the effect that issues have on your project and thereby increase its chances of success.

Six Effective Ways to Perform Issue Management

Issue Management is the method by which issues currently affecting the ability of the project to produce the required deliverable are formally managed. A project issue may be identified at any stage of the project by completing an Issue Form.

An Issue Form is a document which is completed by a member of the project to raise with management a new project issue affecting the scope, deliverables, timeframes and/or resources. The Issue Form will include:

1. Summarized project information (such as name, delivery date)

2. A detailed description of the particular issue identified

3. A full description of the impact of the issue on the project

4. A rating of the impact of the issue on the project

5. A list of recommended actions needed to resolve the issue

6. A formal approval section for authorization of the issue actions.

After completing an Issue Form and logging the details in the Issue Register, the issue is evaluated by the Project Manager and a set of actions taken to resolve it.

Manage Scope

Four Steps to implement a "Change Management Process"

Change Management is the process of monitoring and controlling changes within a project. By managing the implementation of change, you can:

- Reduce the impact of changes to the project

- Ensure that changes do not affect the project's ability to achieve its desired objectives

- Control the cost of change within the project

Change Management is comprised of the following processes:

Step 1: Identify Change

The first step in the change process is to identify the need for change. Any team member can suggest a change to the project, if he or she believes it is needed to keep the project producing deliverables to the customer's specified requirements. After identifying a need for change, the team member records relevant information on a Change Request Form (commonly called a CRF), describing the change, and identifying drivers, benefits, costs and likely impact of the change on the project. The CRF is forwarded to the Project Manager for review and approval.

Step 2: Review Change

The Project Manager investigates the change to identify the reason for it and its impact. Then he or she decides whether it is critical to the successful delivery of the project. Changes which are not critical to project delivery should be avoided whenever possible to prevent "scope creep" (i.e. the gradual increase in scope throughout the Project Lifecycle).

If the change is deemed critical to success, the Project Manager either approves the request or seeks approval for the CRF raised. In some cases, the Project Manager has the direct authority to approve minor change requests; however, in most cases the Project Manager needs to seek CRF approval from the Project Board.

Step 3: Approve Change

The Project Board reviews the details in the CRF to determine whether or not the change should be implemented. Based on the level of risk, impact, benefits and cost to the project, it may decide to decline, delay or approve the change request.

Step 4: Implement Change

The Project Manager approves all changes, which are then scheduled and implemented accordingly. After implementation, the Project Manager reviews the effects of the change on the project to ensure that it achieved the desired outcome.

Throughout the Change Management Process, the Project Manager can monitor and control changes to the project by keeping the Change Register up-to-date.

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There you have it. By completing these 4 steps, you can carefully monitor and control project changes, to increase your likelihood of success. If you would like to use a suite of templates to complete each of these activities quickly and efficiently, then read about the Change Management Kit from Method123 (www.Method123.com) and the Template Collective (www.TemplateCollective.com). This kit includes all of the templates, forms and processes required to perform Change Management efficiently.

Five Steps to Scope your Projects

The "project scope" is all of the things that must be produced to complete a project. These 'things' are called *deliverables* and you need to describe them in depth as early in the project as possible, so everyone knows what needs to be produced. Take these 5 Steps to scope your projects:

Step 1: Set the Direction

Start off by setting the direction for the project. Do you have an agreed Project Vision, Objectives and Timeframes? Are they specified in depth and has your customer agreed to them? Does everyone in the project team truly understand them and why they are important? Only by fixing the project direction can you truly fix the project scope.

Step 2: Scope Workshops

The best way to get buy-in to your project scope is to get all of the relevant stakeholders to help you define it. So get your project sponsor, customer and other stakeholders in a room and run a workshop to identify the scope. What you want from them is an agreed set of *major deliverables* to be produced by the project. You also want to know "what's out of scope".

Run the workshop by asking each stakeholder for a list of the deliverables they expect the project team to deliver. Take the full list of deliverables generated in the workshop and get them to agree on what's *mandatory* and what's *optional*. Then ask them to prioritize the list, so you know what has to be delivered first.

Step 3: Fleshing it out

You now have an agreed list of deliverables. But it's still not enough. You need to define each deliverable in depth. Work with the relevant people in your business to describe how each deliverable will look and feel, how it would operate and how it would be supported etc. Your goal here is to make it so specific that your customer cannot state later in the project that "when they said this, they really meant that".

Step 4: Assessing Feasibility

So you now have a detailed list and description of every deliverable to be produced by your project, in priority order and separated as mandatory / optional. Great! But is it feasible to achieve within the project end date? Before you confirm the scope, you need to review every deliverable in the list and get a general indication from your team as to whether they can all be completed before your project end date. If they can't, then which deliverables can you remove from the list to make your end date more achievable?

Step 5: Get the thumbs up

Present the prioritized set of deliverables to your Project Sponsor and ask them to approve the list as your project scope. Ask them to agree to the priorities, the deliverable descriptions and the items out of scope.

By getting formal sign-off, you're in a great position to be able to manage the project scope down the track. So when your Sponsor says to you in a few weeks time "Can you please add these deliverables to the list?", you can respond by saying "Yes, but I'll either have to remove some items from the list to do it, or extend the project end date. Which is it to be?". You can easily manage your Sponsors expectations with a detailed scope document at your side.

Five Tips for Managing Scope

Why does a customer change their requirements frequently? Simply because your project scope is fixed for a period of time, yet your customers business is constantly changing. And the bad news is that the longer your project is, the more likely it is that your customer will want to change their requirements. So how do you manage this?

Tip 1: Set it in Concrete

Sounds simple, but the first step is to define the scope of the project in depth. It sounds easy-but what really is the *scope* of the project?

We define scope as "the complete set of deliverables that you need to produce for your customer". This means that by defining your project deliverables in depth, you're actually defining your project scope in depth at the same time!

Tip 2: Plan it Out

When you create your project plan, don't *just* list the "activities" that need to be taken to complete the project. Instead, group all of the activities in your plan under the relevant deliverables, so that you can see which activities contribute to the completion of each deliverable in your project. Of course, once each set of activities are finished, you can mark the corresponding deliverable as 100% complete. In this way, you'll be able to keep an eye on the status of each deliverable and therefore monitor the progress of your project, against the agreed scope.

Tip 3: Monitor Quality

Yes it's important that you complete all of the deliverables listed in you project plan, however it's also important that these deliverables meet your customers expectations. These expectations are called "quality targets" and they describe how the deliverables will function or perform. To meet these quality targets, you'll need to put in place "quality controls", which are checks to ensure that the deliverable is going to "do what it's supposed to do". Only then, can you rest assured that the project is going to be signed off by the customer.

Tip 4: Manage Changes

This is possibly the most valuable tip. Every time your customer changes their requirements, make sure that you document their change request and then review the impact of that change, on your project deliverables. If the change is going to impact on your ability to deliver the project on time, within budget and to spec, then get the customer to sign off the change. Then hound them for more money, time or people, or whatever it is that you will need to implement the change effectively.

Tip 5: Report Everything

And lastly, report on any changes that have happened and their effect on the project. This will ensure that if you pass your project deadline, you can show that it was the change requests that caused it. Your customer will be more understanding (as they probably requested the changes in the first place) and your team won't go into "crises mode" as most teams do when they are officially 'late'.

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So by defining the scope at the outset and setting out your deliverables in your plan, and then monitoring quality and changes, you can manage the scope of your project in a formal, controlled fashion, that's acceptable to your customer.

Seven Techniques for Gathering Requirements

1. **One-on-one interviews**

The most common technique for gathering requirements is to sit down with the clients and ask them what they need.

2. **Group interviews**

These are similar to the one-on-one interview except that there is more than one person being interviewed. Group interviews require more preparation and more formality to get the information you want from all the participants.

3. **Facilitated sessions**

In a facilitated session, you bring a larger group together for a common purpose. In this case, you are trying to gather a set of common requirements from the group in a faster manner than if you were to interview each of them separately.

4. **JAD sessions**

Joint Application Development (JAD) sessions are similar to general facilitated sessions. However, the group typically stays in the session until a complete set of requirements is documented and agree to.

5. **Questionnaires**

These are good tools to gather requirements from stakeholders in remote locations or those that will have only minor input into the overall requirements. It can also be the only practical way to gather requirements from dozens, hundreds or thousands of people.

6. **Prototyping**

Prototyping is a way to build an initial version of the solution – a prototype. You show this to the client, who then gives you additional requirements.

7. **Following people around**

This is especially helpful when gathering information on current processes. You may need to watch people perform their job before you can understand the entire picture. In some cases, you might also like to participate in the actual work process to get a hands-on feel for how the business function works today.

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Knowing your audience will help you determine the right techniques to utilize to best meet your needs. You should select techniques that get you the most relative information and are best suited for the audience.

Seven Steps to Scoping 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 (and use this software) 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 with a vest 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 its 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 its 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 taken at this point of the project and this approval will give you the confidence to move forward.

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By taking these steps to scoping your project, you will be able to manage your projects better.

Manage Communication

Two Ways 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 everyone's 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 . 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.

Four Tips for Project Communication

Back in the 60', Motown's "I Heard it Through the Grapevine" was a huge hit, made famous by Marvin Gaye's recording. Even though he himself is no longer with us, the grapevine he sang about is alive and well, Since it is a timeless metaphor for the way news travels.

In a project environment, the circulation of unofficial information and rumors is enough to make heads spin. We set up official communication plans that detail who knows what and when, but struggle with managing the unofficial information. The following are tips to stop the confusion and manage the grapevine effectively:

Tip 1 - Become Part of the Grapevine

People love talking about what goes on within their work environment. The grapevine truly does exist in all companies. Assume the projects you manage are one part of that conversation, insert yourself into it and ask people what they are hearing about your projects. Is there any news from above? Are resources happy? Then, be sure to add your own facts into the mix. A little bit of accurate information never hurt anyone.

Tip 2 - Combat Negative Messages with Facts

Negative communication sometimes gets spun into a mile-long email thread. Inaccurate information and intensity of emotion continue to escalate the longer the email thread grows. The best antidote to negative communication is to get the facts out there as quickly as possible. Compose a thoughtful and precise "Reply All" with a handful of relevant facts to get everyone in sync. Then, kill the thread and take it offline.

Tip 3 - Stop the Bad Press

Most talk on the grapevine is harmless, primarily serving as an interesting diversion during a long day at work. People don't really pay that much attention to it. However, innocuous gossip can turn into hurtful and malicious slander. You need to track down the source of that information immediately and make it stop. Find out why someone feels compelled to put forth such negative propaganda about your project and deal with it face-to-face.

Tip 4 - Fill the Vacuum

You may have projects that aren't impacted by negative communication. However, you are left with a vacuum of communication. It's up to you to fill this void with positive and factual information about your project. Send out pertinent emails, give appropriate updates at company meetings, and have one-off conversations. That way, people will really have something to talk about when your project gets tangled up in the grapevine.

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The grapevine has been around since the time the 3rd person walked on this Earth. There's nothing you can do to stop it from happening, so include it as part of your unofficial communication plan. You'll notice a big difference with the buzz on your projects.

Four Ways to Improve your Presentation Skills

1. 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.

2. On the day

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

1. Get a 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.

3. 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.

4. 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 key points you've just mentioned.

Remember, public speaking is one of the hardest 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.

Four Steps to Creating a Detailed "Communications Plan"

During the Planning phase, it is necessary to identify how each of the stakeholders will be kept informed of the progress of the project. The Communications Plan identifies the types of information to be distributed, the methods of distributing information to stakeholders, the frequency of distribution and responsibilities of each person in the project team for distributing information regularly to stakeholders.

A clear Communications Plan is vital to the success of the project to ensure that all project resources are working towards the stated project objectives and that any hurdles are overcome in a well planned and informed manner. The Communications Plan should contain:

1. The communication requirements for each project stakeholder (i.e. who needs what information and when)

2. A schedule of the communication events, methods and releases (such as project team meetings, quality review meetings, customer acceptance meetings, status report releases and stage gate releases)

3. A matrix of the resource involved in each communication event (listing also their responsibilities)

4. A clear process for performing each communication event within the project.

That is how you identify how keep stakeholders informed of the progress of a project.

Four Essential to Document your Projects

Here are the essential documents you need to complete…

1. **Initiation**

- **Business Case:** To justify the financial investment in your project, you need to write a *Business Case*. It lists the costs and benefits, so everyone knows what the return on investment will be.

- **Feasibility Study:** Before you kick-off your project, you need to determine whether your project is feasible, using a *Feasibility Study*.

- **Project Charter:** You then need to document the objectives, scope, team, timeframes and deliverables in a *Project Charter*.

2. **Planning**

- **Project Plan:** You need to create a *Project Plan* listing all of the tasks required to plan your project from start to finish. Every task must be scheduled, so you know what needs to be done and when.

- **Resource Plan:** Next, you need to plan your resources by documenting the money, equipment and materials needed for your project.

- **Quality Plan:** You then need to set quality targets, so that the project deliverables meet the expectations of your customer.

- **Risk Plan:** All of the risks need to be documented and their *likelihood* and *impact* on the project identified.

- **Communication Plan:** You need to plan your communications, so that you send the right messages to the right people, at the right time.

3. **Execution**

- **Time Management:** You need to use *Timesheets* to track time spent on your project. Then update your Project Plan with your Timesheet data to see whether your project is still within schedule.

- **Cost Management:** Track your costs using *Expense Forms*. Every expense is formally logged and approved, so that you can confirm at any time that you are currently under budget.

- **Change Management:** Document each change to the project scope, using *Change Forms*. You can then control change to ensure your project is always on track.

- **Risk Management:** Use *Risk Forms* to document each risk to the project. You can then manage project risk carefully to ensure that nothing happens that will affect the project schedule or budget.

- **Issue Management:** As each issue occurs on the project, you need to investigate its impact on the project and then write it up on an *Issue Form*. You can then kick off the tasks needed to resolve it quickly.

4. **Closure**

- **Project Closure Report:** When your project is complete, document all of the actions needed to close the project properly. This includes releasing teams and suppliers, equipment and materials.

- **Post Project Review:** And after your project has been closed, you can review its success and document the results for your sponsor. That way, you can show that all of the objectives were met and that the project was delivered on time and within budget.

And there you have it. By completing each of these documents for your project, you can boost your chances of success.

Four Easy Steps to Creating a Communications Plan

The Communications Plan describes the information that must be disseminated to all project stakeholders, to keep them regularly informed of the project's progress. You can create a Communications Plan by taking these 4 simple steps:

List the Communications Stakeholders	→	Identify the Communications Requirements	→	Build a Communications Schedule	→	Define the Communications Process
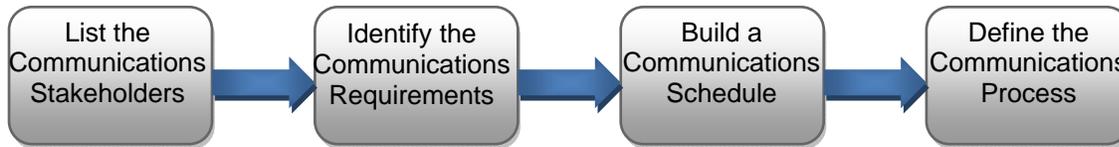
To begin, you first need to identify all of the stakeholders who require regular information about the status of the project. Then, identify the information requirements of each stakeholder group. Create a schedule for the dissemination of that information to those stakeholders throughout the Project Lifecycle. And finally, define the process for delivering communications throughout the project. Here is a more detailed description of each step you need to take:

Step 1: List the Communications Stakeholders

Effective communication is all about distributing "the right information to the right people at the right time." To identify the right people with whom to communicate, you will need to create a list of the communications stakeholders. A communications stakeholder is a person inside or outside the project, who requires regular information about the project status. For instance, a Project Sponsor needs to be kept informed of the overall progress of the project, while an external body may need to be kept informed of the regulatory compliance of the project.

Step 2: Identify the Communications Requirements

Now that you have identified the stakeholders, you need to describe their requirements for information regarding the progress of the project. For instance, they may require information relating to the project status, risks, issues, changes, performance and delivery against target.

Step 3: Build a Communications Schedule

You now have the information needed to communicate "the right information to the right people." To ensure that you communicate it "at the right time," you need to build a schedule of communications activities. Communications activities are groups of tasks that are taken to disseminate project information to stakeholders in order to keep them regularly informed of the progress of the project. Examples of the activities you may need to schedule include: press releases, newsletters, Project Status Reports, presentations and internal project memos.

Step 4: Define the Communications Process

Now that you have created a detailed Communications Schedule, you need to define the process for monitoring and controlling the communications taken throughout the project. Define the Communications Management Process for your project by documenting the:

- Purpose of the process
- Steps involved in performing the process
- Roles and responsibilities involved in performing the process
- Templates used to support the process

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That is the four steps to creating a Communications Plan.

Five Keys to Creating a Bullet-Proof "Project Status Report"

The Project Status Report summarizes the entire progress of the project to date. It also provides the stakeholders with a list of the critical changes, risks and issues which require immediate attention. If you want to create a bullet-proof status report, then make sure that your report includes each of the following sections:

Executive Summary

Summarize the overall progress to date and any key achievements. Then state whether the project is currently on schedule and within budget. List the key deliverables accepted by the customer so far and describe all high priority risks and issues. Finally, describe any changes affecting the project.

- **Schedule**
    - List the **deliverables** accepted by the customer
    - Identify the **scheduled** completion date for each deliverable
    - Identify the **actual** completion date for each deliverable
    - List actual and scheduled completion date **variances**
    - Identify the new **forecast** completion date for each deliverable
    - List the scheduled and forecast completion date **variances**

- **Expenses**
    - List each expense type; such as labor, equipment & materials
    - Identify the **budgeted** expenditure, per expense type
    - Identify the **actual** expenditure, per expense type
    - List actual and budgeted expenditure **variances**
    - Identify the **forecast** expenditure, per expense type
    - List budgeted and forecast expenditure **variances**

- **Effort**
    - List all of the major **activities** that staff have spent effort on
    - Identify the amount of effort originally **budgeted** per activity
    - Identify the **actual** effort expended per activity
    - List actual and budgeted effort **variances**
    - Identify the **forecast** effort, per project activity
    - List budgeted and forecast effort **variances**

- **Quality**
    - List the **deliverables** to be provided by the project
    - List the original **quality targets** set for each deliverable
    - Describe the extent to which each quality target was **achieved**

- o   Identify any **variances** between the quality target set and the actual level of quality achieved, for each deliverable

- **Risks and Issues**
    - o   List the high priority **risks** raised during the reporting period
    - o   **Rate the likelihood** of each risk occurring and its project impact
    - o   List the high priority **issues** raised during the reporting period
    - o   Rate the current impact of the issue on the project

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And that's it. If you create a project report which describes each of the sections above, then you will keep your project stakeholders better informed of the overall progress of the project.

Five Tips on Project Reporting

1. *Project status:* Create a weekly Project Status Report to show your actual vs. planned effort, percent complete and actual vs. forecast spend. Specify the number of open risks, changes and issues, and state whether action by your Sponsor is required to resolve them. Also show the forecast amount of time, effort and money required to finish the project. Always try and forecast as accurately as possible. Never forecast optimistically, always conservatively.

2. *Task completion:* You need to regularly show your Sponsor your progress against the tasks listed on your schedule. Create a summarized view of your project plan and update it to reflect the percent complete for every task. Then append this summary view to your Project Status Report. This way, your Sponsor can drill down to see further information about each task, if they want to.

   By offering your Project Sponsor both summary and detailed information weekly makes them feel like your project is an "open book". They will have all of the information about your project at their finger-tips. This way, you will get more buy-in from your Sponsor and more support when it's needed.

3. *Milestones:* You need to add Milestones to your project plan to show when the major project deliverables will be produced. You then need to report on the progress of each milestone to your Sponsor. Show the percent complete of each milestone, and again, forecast the completion dates.

   Here's another tip: You will get more out of your team if you motivate them to complete milestones, as opposed to tasks. That's because people are usually proud of the things that they have achieved in life (i.e. milestones), as opposed to the things they have done to achieve them (i.e. the tasks).

4. *Getting help:* Project Sponsors don't always want to hear "we're on track and under budget" in their project reports. They just want to hear the truth. So if you're behind schedule and you need help to get back on track, then tell your Sponsor about it in your project reports.

   State exactly what you need from them. Show them that you're doing the best you can and that you're the best person for the job, but that you still need their help to deliver the project. If you need more time, money or resources, then ask for it. Don't be afraid. And remember, the best time to ask for help is before you really need it. This gives you contingency, because it always takes time for help to arrive.

5. *One version of the truth:* Your project reports need to depict "one version of the truth" to your team. Keep them 100% accurate and be as open as possible about real issues that are affecting your team. Remember that if you communicate an issue to your Sponsor, then it becomes their issue to fix as well. Reporting issues is a great way to share the responsibility for fixing them.

And that's it!

Five Top Types of Project Reports

Entire forests could be destroyed if we printed out all the various reports we receive each day to manage our projects. Many reports end up being either auto-forwarded to the Trash bin or they are manually deleted them any time they show up in the Inbox.

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.

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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.

Five Tips to Improve Your Project Meetings

Everyone dislikes meetings that drag on. So your job is to make it focused, highly driven and to add a sense of purpose. If you do this, then you'll boost team motivation and morale. Here are 5 tips to help you...

Tip 1: ***Plan wisely***

To make sure you get the most out of your meetings, you need to plan them wisely. Prior to each meeting, write down 3 goals that you want from the meeting. Here are some examples:

- "I want the team to know we're on track"

- "I want any issues or risks to be raised"

- "I want them to feel valued and motivated"

Then you need to work out how you're going to achieve your goals. The next few tips will help you with this...

Tip 2: ***Open and close carefully***

Like in theatre, people most remember the opening and the closure the most. So open and close your meetings carefully. When you open the meeting, tell them what the purpose of the meeting is, what you want to get out of it and why it's important. This gets their attention and sets the scene. When you close the meeting, tell them what has been agreed / achieved in the meeting and the next steps going forward.

Tip 3: ***Control the conversation***

You need to be in complete control of the meeting at all times, to ensure that:

- The meeting follows the agenda

- You never get stuck on a single issue

- One person doesn't dominate it

- Everyone has their say

Start by standing or sitting in a prominent place in the room. Raise your voice a little to add presence. Jump in frequently when people talk too long. Be polite but strong. Control the meeting as a coach would control a football team - by constantly watching, listening and directing the team. If possible, ask someone else to record the minutes. This gives you the time needed to control the conversation so that the agenda and your 3 goals are met.

Tip 4: ***Park it and move on***

Often in meetings, a single issue can consume the majority of the meeting time. If the issue is not related to your specific meeting goals, then tell the team to "park it and move on". Record the issue on a whiteboard or paper and address it with the relevant team members separately after the meeting. This keeps your meetings short and focused.

Tip 5: ***Keep it action orientated***

Projects are all about "getting things done". So make sure that where possible, every discussion results in an action to be completed. Focusing on the actions that are needed is a great way of reducing the length of meetings.

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Use this Project Methodology to keep your team focused. Step your team through the Methodology in meetings, so they know what they have to do, how and by when.

Five Steps to Improve your Decision-Making

This may surprise you, but most great leaders use the same 5 steps for making decisions. So read the 5 steps below and use them to improve your decision-making on projects:

Step 1: Investigate the problem

When a problem is presented to you, take the first step by spending the time needed to identify its root cause and make sure it's not just a symptom of another underlying problem. Project problems are usually related to people, processes, equipment or materials. Find out when, why and how it occurred and its impact on the project.

Step 2: Prioritize it

On projects, problems occur all the time. You need to determine whether each problem needs your urgent attention or not, based on its impact on the project. If it's high impact (e.g. it's preventing your team from working) then it's "high priority" and you need to stop work and get it resolved quickly.

Step 3: Identify the solutions

With a clear understanding of the problem and its priority level, you need to identify solutions to address it. Then review each alternative to determine whether it actually:

- Solves the root cause of the problem
- Is easy and practical to implement
- Will prevent the problem from re-occurring

Step 4: Make your decision

Now you have all of the information you need to make your decision. Don't make your decisions too hastily. Take time out of your day to carefully consider all of the pros and cons. Go for a walk, or if it's really important *sleep on it* so you have a clear head when deciding. Make non-important decisions quickly, but take a little more time when making decisions which are critical to the success of the project.

Step 5: Act on it

Once you have thought it through and made your decision, you need to be fully committed to implementing it. Act on it immediately by telling your team about it and then scheduling the tasks needed to make it happen. Remember, every problem affects your project in some way, so you need to act quickly once you've decided on what to do.

If you follow these steps for every decision you have to make, then you'll make better decisions, faster. And you'll feel good about it.

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One way to reduce the number of decisions you have to make on projects, is to use a Project Methodology. It will guide your entire team through a proven step-by-step process, so that everyone knows what has to be done. So you don't have to decide how you want to run your projects. You simply follow the methodology to do it.

Five Ways to Document Your Projects

Regardless of the type, industry or size of project you're involved in, you need to create these 4 critical project documents:

1. **Project Charter**

At the start of every project you need to write a Project Charter. This document defines the *vision* for the project and it clearly lays out the scope of what must be achieved.

Every major *deliverable* that you have to produce is defined in depth and you need to specify the general timeframes for delivery so that you know what must be produced and by when.

This is the single most important document in the Project Life Cycle as without it, it's like "shooting in the dark". Once written, you must get your customer or Project Sponsor to authorize it. Only then, do you have an agreement with them stating what must be delivered and by when.

2. **Project Plan**

We speak to people all the time that have projects that are going "off-the-rails", but they have no solid Project Plan by which to measure against. Create your project plan and share it with your team.

Your plan needs to list every deliverable that is included in your Project Charter and it needs to include all of the major tasks needed to produce that deliverable on time.

The plan will become your "Project Roadmap" for success. Without it, you have no solid direction and way of comparing progress over time.

"If you fail to plan, then you plan to fail". It's as simple as that.

3. **Job Descriptions**

With a Project Charter and Project Plan, everyone knows what has to be done to deliver the project and by when. They also need to know what their specific role is or what they are responsible for delivering.

To make this clear, you need to fill in a Job Description for every member of your team. It will help you make it crystal clear what their targets are, what you expect of them and the criteria for measuring their performance.

Every high performing team need clear targets. Your Job Description is the place you set these targets and it's also the document that you use to measure their performance throughout the project.

4. **Communications Plan**

To ensure you don't fall into the same trap, create a Communications Plan. It tells your team and your boss, how you're going to keep every-one informed of the status of the project along the way.

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Whether it's through regular team meetings, a project blog, detailed reports or one-on-one catch-ups, your Communication Plan will help you keep the right people informed at the right times, with the right information. Everyone will then be on the same page, all supporting you with the delivery of the project when you need them.

Six Tips to Eliminate Excess Meetings

1. **Encourage Accessibility.**

Many times meetings are scheduled because decision makers have been inaccessible. They are holed up in their office with the door closed all day, or they may be road warriors that rarely return phone calls or emails. Encourage these key decision makers to make themselves accessible for quick questions, return calls and prompt email replies. This will eliminate the need to drag them, and a whole bunch of other people, into a meeting.

2. **Use a Good Project Management Tool.**

Affordable project management tools have reached a level of simplicity and sophistication that just a few years ago was reserved for expensive enterprise level solutions. Take advantage of these tools to do things that otherwise call for a meeting: task assignment, collaboration, and discussions. These can all occur virtually and eliminate the need for scheduling another meeting.

3. **Change Your Culture.**

Unnecessary meetings can be a result of people not wanting to make their own decisions. They may not realize they have permission to make decisions on their own. Work on changing your culture from one of indecision to it's easier to ask forgiveness than it is to ask permission. Good people will make good decisions. Trust them to do the right thing without having to call a meeting for every decision. They will infrequently also make bad decisions. Work with them to show them what they could have done differently, but don't chastise them to the point that they revert to the old culture of meeting madness.

4. **Know How Much Your Meetings Cost.**

Understanding the cost of personnel when you hold a meeting can be an eye opener. A one hour meeting with eight average-salaried employees will easily run into the hundreds of dollars. In a mid to large sized company it quickly adds up to up to thousands of dollars spent weekly just on meetings! Is there a better use of everyone's time that provides a greater ROI to the company? Most likely, there is.

5. **Review the Need for Recurring Meetings.**

Project managers love recurring meetings. When a project starts out, one of the first things we typically do is set up a weekly meeting where everyone can touch base about the project. These meetings are invaluable during the project's early days, but they begin to lose their utility as the project progresses. Review the frequency of your recurring meetings to see if perhaps they could be moved to every other week, or maybe even once a month if things are going well with the project.

6. **Pay Attention.**

You need to lay ground rules at the outset of meetings that encourages everyone to pay attention. Kindly remind them to take their hands off their laptops, check their digital devices at the door, keep their eyes up, be attentive and engage. It's a waste of your time if you have to schedule a one-on-one meeting to discuss something that was covered - but that they didn't catch!

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Meetings are indispensible when it comes to sharing information, collaborating, and making decisions. However, be mindful that meetings can also be time wasters and productivity killers.

Six Steps to Project Communications

Implement these suggestions and you will easily gain up to a full day of your work life back each week.

The Communications Management Process is the method by which formal messages are identified, created, reviewed and communicated within a project.
Clear, accurate and timely communication is critical to the success of any project, as miscommunication can result in increased project risk.

If you communicate properly, the right stakeholders will receive the right information at the right time. This enables them to make well-informed decisions about your project.

There are a variety of ways that you can communicate the project status to stakeholders, such as through:

- Press releases

- Internal newsletters

- Project Status Reports

- Presentation materials

- Website news releases

- Internal project memos

Regardless of the type of media used to communicate within your project, these six communications steps will always apply:

Step 1: Identify the Message
Your Communications Plan will identify the communications messages that need to be distributed, to keep your stakeholders informed of the project's progress. Throughout the project, the Project Manager should review this plan to identify which messages need to be distributed, how and when.

Step 2: Target the Audience
Now that you have identified what it is that needs to be communicated, the next step is to identify who it is that the message needs to be communicated to. The audience for each message needs to be confirmed and may include such recipients as the:

- Entire project team
- Project management team
- Project Office team
- Project Board

Step 3: Decide the Timing
At this point, the type of message and the audience have been clearly specified. The next step is to identify the timing and frequency of the communications message.

In some cases, regular communications, such as weekly Project Status Reports or monthly newsletters, may be necessary. In other cases, a one-off communication event, such as a project change notification, may be more appropriate.

For each communications event, you need to be satisfied that the regularity and timing for each communications event is suitable.

Step 4: Confirm the Format
With content, audience and timing decided, the format of the communication message can be effectively chosen. There are a number of different types of formats to choose from, including verbal presentations, written reports, memos, letters and emails.

Step 5: Create the Message
You should then document a first draft of the message content. The Project Manager will then review it and they may suggest changes. When a final draft is completed it is submitted for approval and release.

Step 6: Communicate the Message
Once approved the message is communicated to the target audience. The Project Manager may need to seek the Project Sponsor's approval before releasing certain high risk communications messages, such as:

- Critical project risks or issues

- Changes to the scope, objectives or timeline

- A change in project budget or spending policy

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That's it. If you take these six steps each time you send out a communications message within your project, you will ensure that the right people receive the right message at the right time!

Seven Top Tips to Write Great Project Documents

Take these top tips to improve your *writing skills*:

Tip 1: Keep it Simple

Great writers can cover whole topics in just a few short paragraphs. To do this, you need to remove any surplus content, clutter and jargon and write in simple, plain terms that everyone understands. That way, your documents will be quick and easy to read.

Tip 2: Make it Focused

To create a powerful project document, you need to focus purely on the topic. This will make your document more persuasive and inspiring to read. So think carefully about the content that your readers expect you to cover. Then list your topics and stick to them. Never write off the topic. If you need to go off topic, then put the content in an Appendix at the end and refer to it.

Tip 3: Have a Clear Structure

You also need to think carefully about your Table of Contents. Your readers need to be able to scan the Table of Contents to get a quick feel for what your document contains. The Table of Contents should be simple and easy to understand. In your document, you should also:

- Use tables to make it easier to read

- Insert diagrams to explain difficult topics

- Use short paragraphs to accentuate points

- Make use of bolding, italics and underlining

- Use bullets, as they are easily scanned.

Tip 4: Always Tell a Story

Everyone loves a good story. So write each document as though it was the best story in town. Start with the beginning by introducing your topic and telling them what they are going to learn by reading your document. Then write the main body of the document and end with a conclusion.

Tip 5: Make it Flow

Write your document so that each of the sections flow from one topic to the next. This way, the user never has to pause to work out where they are. So before you finish each section, introduce the next section.

Tip 6: Just the right amount

Give your readers "just the right amount of information" needed. Keep it short, but informative and helpful.

Tip 7: Be inspiring

Great writers are passionate about what they are writing. If you are positive and inspirational about your documents, then your reader will catch the excitement and your document will be enjoyable to read.

Ten Steps to Create a Communications Plan

Using the latest Communications Plan template released today, 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 ten 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.

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Once you have taken these ten 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.

Manage Risk

Four Critical Steps to Creating a Risk Plan

So what is a Risk Plan? It's a document that identifies all of the foreseeable project risks and the actions needed to prevent each risk from occurring. To gain the best results, you need to create a Risk Plan for your project as early in the Project Lifecycle as possible, ideally soon after the **Project Plan** has been created. Take these four critical steps to building a Risk Plan:

Step 1: Identify the Risks

Sounds easy right? Most Project Managers will agree that identifying all of the high priority risks for a lengthy project is more of an art than a science. Firstly, you need to identify all of the potential categories of risk (i.e. areas within the project which are likely to contain risks) such as the scope, schedule and budget. Then for each category, list the risks which are likely to adversely affect the project. For Example:

- "That the project will spend more than the budget allocated"
- "That change requests will lead to scope creep and delays"

Having a comprehensive risk list is critical to delivering a project successfully.

Step 2: Prioritize the Risks

The next step is to prioritize each risk by determining its likelihood of occurrence and the impact on the project should it eventuate. Here's how to do it:

- For each risk identified, assign a score (between 1 and 10) to describe its <u>likelihood</u> of occurrence. For instance, a risk that is almost certain to occur will score from 8 to 10 whereas a risk with a low likelihood will score between 1 and 3.

- Then assign to each risk an <u>impact</u> score (between 1 and 10) to determine the severity of the impact of the risk on the project scope, scheduled end-date, budget or other key success criteria.

- Now take an average of the likelihood and impact scores, to determine the overall risk <u>priority</u>. The higher the average score, the higher the priority of the risk. Of course, high priority risks will not only be monitored by the Project Manager, but the Project Board will also keep track of them to ensure that they do not adversely affect the project during the Project Lifecycle.

Step 3: Create a Risk Schedule

Great! So you now have a full list of risks and their priorities for your project. The next step is to identify the actions needed to reduce the likelihood and impact of each risk, by creating a Risk Schedule. The Risk Schedule lists all of the risks identified to date and for each risk the

- Overall priority of the risk (low, medium, high)
- Preventative actions to reduce the likelihood of the risk occurring
- Contingent actions to lessen the impact of the risk on the project
- Resource responsible for taking the actions identified
- Timeframes for performing the actions listed

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That is how you build a Risk Plan for your project

Five Ways to Reduce Project Risk

1. **Start out on the Right Foot**

Too many projects get started without a solid definition of what must be delivered. So always start out by writing a detailed Project Charter. This document states the project vision, objectives, scope and deliverables. Only then, do you know what has to be achieved and by when.

2. **Make your Team Accountable**

Why should you shoulder all of the responsibility for the project? Instead, pass on responsibility to each member of your team. Tell them which elements of the Project Charter they are responsible for delivering and make them accountable by holding review meetings each week to measure progress.

3. **Identify risks upfront**

Then hold a workshop to identify likely risks to your project. A risk is an unforeseen event that might negatively impact on the project in the future. Examples of risks are: "that our suppliers might deliver late", "that we might run out of materials" or "that we can't find extra resources when we need them". You need to document every risk and determine its likelihood and impact on the project.

4. **Plan Risks Wisely**

With all of the risks known upfront, you're ready to create a Risk Plan. This document will identify actions that you can take now to reduce the likelihood of the risk occurring. So for instance, if your risk was "that we might run out of materials" then strike a deal with a supplier that requires them to make additional materials available when you need them. Or find another supplier as a backup.

5. **Monitor Risks Carefully**

As the project progresses, run bi-weekly or monthly risk meetings to review the risks you've identified. Ask these questions: Are the risks likely to occur? Are there any new risks that you face? Have the actions in your Risk Plan been completed? Is your level of risk reducing? Only by monitoring your risks carefully, can you control the overall level of risk on the project.

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And one more tip to help you...

Keep an open book

Communicate your project risks openly to your boss or project sponsor, so that everyone is aware of them. Don't keep them to yourself. Send them a regular report listing the risks and your plan of action for resolving them.

It will give them confidence in your ability to control the project and it will help gain their support when you need it.

Ten Effective Tips for Managing Project Risk…

The following tips will help you to perform Risk Management quickly and effectively for your project:

1. **Create a Risk Plan** to ensure that all of the project risks have been clearly identified and prioritized, early in the planning stage of the project.

2. **Perform Risk Reviews.** These reviews are meetings between key members of the Project Team to monitor and control risks within the project. At each review meeting, the current risks should be assessed and any new risks will be raised for consideration.

3. **Use Risk Forms.** Every time you identify a new risk within the project, you should document it by completing a Risk Form. This form helps you to fully describe the risk and rate its likelihood of occurrence and impact on the project should it actually eventuate.

4. **Identify the Risk Priority.** For each risk raised, you should calculate the overall priority of the risk by summarizing the likelihood and impact rating scores previously assigned.

5. **Create a Risk Register.** By recording the details of all Risk Forms in a Risk Register, you will be able to monitor and track risks and their priorities quickly and easily each week.

6. **Report High Level Risks.** To ensure that the Project Board is kept fully informed of the overall status of the project, you should report all high level risks to them for action. This also helps them to share in the ownership of key risks which may severely impact the project.

7. **Assign Risk Actions.** Once each risk has been reviewed and its priority determined, you should assign the actions needed to avoid, transfer or mitigate it. Each action identified should be assigned to a project team member to carry out.

8. **Monitor Changes.** Many risks change in nature over time. Make sure that you review the status of each risk weekly to ensure that it has not suddenly increased in priority and need urgent attention.

9. **Share Ownership.** The Risk Management Process is not owned by a single resource within a project. To identify, monitor and control risks successfully throughout the Project Lifecycle, make sure that you gain the full buy-in of all of your project team members.

10. Assign Risk Roles by listing the responsibilities of team members, Project Managers and the Project Board for managing risks within the project.

There you have it! By using these top-ten-tips, you will improve risk management within your project and increase your chances of success.

Manage HR

Three Steps to Manage Project Politics

What happens when your Project Sponsor wants a slightly different outcome for the project than your Customer, Management Team and other Stakeholders want? The answer is that each party tries to influence the project to get what they want-and this is known as "Project Politics".

The result is that the team are constantly pushed in different directions, trying to keep everyone happy, but not really doing what they were originally tasked to do which was to deliver a single outcome for the project.

In this scenario, the project team becomes stressed, confused, de-motivated and inefficient. So it's your job as a Project Manager to ensure this doesn't happen. Here's how to prevent it.

Step 1: Create a Project Board

The most critical but challenging step is to get everyone to agree to the same project scope and objectives. The easiest way to do this is to form a Project Board and include your Sponsor, Customer and other people that may influence the project at some point. The purpose of the board is to control the scope of the project and make sure that specific targets are set and achieved.

By forming a Project Board, you can let them thrash out the politics themselves and come to a consensus. You then have only one party to manage and if they want to divert the project onto other tasks, at least you have their combined approval. If you include all of the "influencers" within the Board, you can task them with giving you a single, consistent vision. That way, there is no confusion as to what must be done to deliver the project and people are not pulled in different directions all of the time. You can also keep the Project Board focused by using a project methodology.

Step 2: Build Relationships

Just because you have a board, doesn't mean there are no politics. It just makes it easier to manage. As a Project Manager, you still need to reduce the politics within the board by building close relationships with each board member. Find out what they need, by when and why. This will help you steer them in the right direction when they meet as a group.

Build close relationships by meeting each board member regularly to find out what they need from the project and why they need it. By listening to their needs, you're securing their buy-in and you may be able to save heated board meetings by presenting them with solutions instead of problems.

Step 3: Manage Change

The biggest risk to a project is that the goal posts move, causing continuous change to the project scope. This is a breeding ground for project politics, because every stakeholder will have their own wants and needs to be met—and they may not all be consistent with one another.

So you need to manage change carefully by putting in place a formal process for managing it. Your change process should involve documenting each Change Request, why it's needed and the impact to the project in implementing it. The Change Request should then be presented to the Project Board for review and approval. You need to make sure that when it's approved the board also approve the extra time, money and people needed to implement it.

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By creating a Project Board and forming close relationships with each board member, you'll cut through politics to ensure your project success. You can then control changes to the project so that you can achieve success.

To ensure that your Board know what is going to be delivered and by when, implement a methodology for projects. A methodology will help you manage the project in a step-by-step fashion, giving your team a clear roadmap forward. Use a Project Methodology to cut through politics and keep your project on track.

Four Benefits of Project Management Training

The following are five reasons training is invaluable to you as a Project Manager.

1. **Training Keeps You Engaged**

Are you feeling a little sluggish on the job? Do you dread the ride into work each morning thinking about the long and boring day ahead of you? Training dispels the monotony. Take a course about an aspect of project management that really interests you. It may be risk management, agile methodologies, or root cause analysis. Deepening your knowledge in areas of interest will shake up your otherwise normal routine and get you excited about your job again.

2. **Training Helps Your Career**

Most professional certifications require an ongoing commitment to training and education. While this takes time, the upside is that it comes with real financial value. For example, a PMP certified Project Manager will make an average of $10,000 more per year than their non-certified counterpart. Keep your training current and an eye on your employment landscape and you'll find yourself doing very well.

Current and potential employers like to see an ongoing pursuit of education. It helps them appreciate you as a lifelong learner who has followed a particular niche or specialty in your project management career.

3. **Training Introduces New Ideas**

You will always pick up something new when you attend a project management training course, simply because the discipline of learning temporarily removes you from your situation and gives you an aerial, objective view. For example, even experienced Project Managers learn new ideas and techniques attending a fundamentals class. They learn new ways of doing things they are already familiar with.

Training allows your experience and new learning to come together and provide a more holistic perspective than ever before. These nuggets of wisdom may not always be groundbreaking or revolutionary, but they are new. When you go to a training course with this mindset, you will come back with faster, more efficient and profitable ways to complete projects to share with your peers.

4. **Training Exposes You to Other People**

Most classes allow you to interact with new people. Maybe it even allows you to interact with current co-workers in new ways. It's valuable to get out of your office or cubicle every now and then and see what the rest of the world is up to, and talk to your peers. The relationships you forge with your instructor, the person sitting next to you, or even someone you meet in an elevator can help you throughout the rest of your career in project management.
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Now you know the four benefits of project management training and why it is invaluable.

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.

Four Ways to Collaborate on Projects

1. **Give them a Common Purpose**

The first step is to set the direction for the project by writing a Project Charter. This document describes the scope of the project, the goals to be met and the timeframes for delivery.

Present your Project Charter to your team over lunch, describing what it is that they must deliver and by when. Then you can ensure that "everyone is on the same page". Remember, collaboration is all about bringing *individuals* together to form a team. By giving them a common direction, you're already on the right track.

2. **Pair them up to Work Together**

Then write your Project Plan and assign multiple people to the same tasks where appropriate, pairing them up to work together.

That way, your team are forced to work together on common tasks, helping them to overcome any previous boundaries or communication difficulties.

Make sure people only do work that is "on the plan", so you can stay within scope. That way, your team won't fragment with different directions appearing all over the place. Remember you need to create "one boat, one team, all rowing in the same direction"!

3. **Give them the Right Tools**

Incentivize your team to work together by giving them a toolset that allows them to:

- *Store* all their files online in one place.

- *Discuss* project tasks, issues and timeframes

- *Message* one-another when they need to see each other's *activity* so they know what's happening

- View *tasks*, calendars and plans online

4. **Promote Collaboration**

Having a great tool set is certainly a step in the right direction. You also need to promote collaboration within your team personally. Reward and recognize great collaboration behavior when you see it. If you see team members communicating effectively online then reward them for it, in front of the team.

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By giving your team a solid direction, the right tools at their fingertips and reinforcing great behavior, you can take a defragmented group of *individuals* and turn them on to the *high performing team* quickly.

Five 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.

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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!

Five Ways to be a Great Project Leader

Being a fantastic leader is all about the way you motivate and inspire your team. Take these five tips to boost your leadership skills:

1. **Set Clear Goals**

Whether it's building the pyramids, landing on the moon or winning the NBA final, every great Project Leader in history has set very clear goals for their team.

Keep your goals "smart" (i.e. specific, measurable, action oriented, realistic and time bound). Only set 2-3 goals. Keep them short, punchy and meaningful. The key is that everyone in your team must be able to remember the goals set, without writing them down. If you can do that, then you're already on the road to success.

2. **Motivate Individually**

Find out exactly what it is that motivates every person in your team. For some it's money, for others it's doing work that they enjoy and for others it's working with a great team.

If you know what it is that motivates every individual in your team, then you can do what it takes to keep them motivated throughout the project. Implementing just one approach to motivating your team (e.g. team building exercises) is not enough. You need to mix it up. That way you can match everyone's individual needs, to keep them pumped and working as hard as possible towards the project goals.

3. **Track Progress Clearly**

As well as setting goals and motivating your team to achieve them, you need to monitor progress each week to make sure you're on track. Make sure you tell your team every week-what they've achieved and what they haven't. Talk through the wins and losses, the challenges and issues. Get their feedback to ensure buy-in.

4. **Reward Good Performance**

Great Project Leaders always reward and recognize great performance in the team. You need to constantly think of new ways of rewarding your team for the right behavior.

Implement two types of reward systems. The first are rewards that are provided when the team achieve certain targets. For instance you might hold a team dinner or social function if the team complete Phase 1 of the project delivery on time.

The second type of reward system is more personal. For those team members that perform at exceptionally high levels, offer them special rewards for good performance. Remember that rewards don't have to be expensive. It's usually the thought that counts and the recognition that goes with it.

5. **Professional Development**

Great Project Leaders are constantly looking for ways to improve how they lead the team. So keep working on your presentation, communication and documentation skills each week by taking time out to learn on the web, watch videos and taking training courses.

If you improve your professional skills every week, then so will those within your team-boosting your chances of success.

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So that's it. If you can set clear goals, track progress, reward and recognize your team and improve your professional skills-then you're sure to become a Great Project Leader!

Improve your documentation skills by downloading the complete Project Management Template kit today from Method123 (www.Method123.com) and the Template Collective (www.TemplateCollective.com). It gives you everything you need to create high-quality, professional looking documents for you and your team...

Five Steps to Building High Performing Teams

What exactly is a high performing team? It's "a team that exceeds the goals you set, by working hard and smart, as a group, not individuals."

Whether you're in IT, construction, engineering or another industry, building a high performing team is critical to success. You can do it in just five steps...

Step 1: Planning

Before you hire your first person, you need to document what it is that your team have to achieve and by when. You also need to create specific Job descriptions that set out your expectations for each role and how you'll measure their performance.

Don't stop there. Think about the team culture you want to build, the dynamics of your team and how they should work together. Only with a personal vision for how your team will perform, will you be able to meet that goal.

Step 2: Recruiting

Recruitment is harder than it looks. It's easy to recruit the wrong person, and it's even easier to build a team that don't perform well. A candidate should only be recruited if they fit the job description, align with your personal vision for how the team will work together and they want to work in a culture that depicts your vision.

Take your time. Be swayed by your gut feel. Recruit "like-minded people". Introduce them to high performing staff you know of and get their feedback. Be choosy. Recruit the best. If you have to pay top dollar for top performer, it will often cost less in the long run, than a cheap resource that doesn't perform.

Step 3: Culture Creation

If you've hired "like-minded people" then they will all like each other, and that's a great start. Get them working together on tasks. Constantly change the people you pair up, so that people get to know others in the team.

If your ideal culture is "performance through achievement" then shout out loud about each team success. And if you want "performance through happy customers" then strengthen the relationship between the team and your customers. Get them socializing. Try team sports.

Step 4: Self Motivation

A happy motivated team will always out-perform an unhappy unmotivated one. And it starts with you! Are you happy and motivated? Get on track personally by working out, relaxing after hours, de-stress and set personal goals. Your motivation will rub off on your team.

Then when you are ready... focus on motivating your team. Use team building and group rallying exercises to get them pumped. Tell them how proud you are to work with them. Help them understand why the goals are important and how every team member contributes to them.

Step 5: Recognition & Reward

People only respond positively to positive behavior. So you need to constantly recognize achievement when it's due. Tell the team about an individual's success. Make them feel proud. Spread the love—don't focus on one team or person too frequently.

And reward them when it's due. Reward them unexpectedly as people will appreciate it all the more. Meals to restaurants...tickets to the super-bowl. These things mean a lot to staff when they didn't expect it!

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And there you are. If you plan for success, recruit a great team, build a positive culture and recognize achievement, then you'll build a healthy project team and boost your chances of success!

Five Tips to Boost your Project Career

You can work hard your entire career but not achieve the results you want. But by focusing your efforts in the right places, you can achieve outstanding results. Here are five valuable tips on how to do it.

1. **Always deliver the goods**

The easiest way to become successful is to "ride the wave of your success". This means focusing hard on delivering your projects on time and under budget. You might have to apply some heavy-weight-boxer tactics to get there, but only by delivering projects on time will you be able to drive your career in the right direction.

2. **Choose the right projects**

You could manage 100+ projects on time, and never get the career boost you want. The trick is in managing the right projects. Start by managing bigger projects than you've managed before. Then when you're ready, take on projects that are critical to the success of the organization. It's these projects that get the attention of your Executive Team. Choose your project wisely. Look for projects that are; core to your business, have full buy-in and are for your most important customers. Yes, these projects are more risky to your career but they also pay the highest dividends if you complete them successfully.

3. **Ride your own wave**

Great, so you've delivered some business-critical projects on time. Now make a song and dance about it! Throw a project closure party and invite your Sponsor. Issue press releases, write-ups in newsletters and tell everyone you know about it. Get your Sponsor involved and make them look good. Make your Sponsor feel proud of you and your team. Then pitch for the next business critical project, boosting your value to the business.

4. **Ride someone else's wave**

Find a manager above you who is highly respected by the CEO of the company and try and work for them. As they advance in their career, you'll advance along with them. Make yourself indispensible to them by taking over tasks that they find stressful. Do what it takes to make their job a breeze. And before you know it, they will be the next CEO and you'll be the next "golden boy or girl".

5. **Put in the hard yards**

It's one thing to "play the game" to boost your career, but it's another to genuinely work hard. Put in the hard yards by working harder and being more focused. Really give it your best shot. If you choose the right projects, shout out about your successes, find the right manager to work for and put in the hard yards, then you'll be sure to achieve your career goals.

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Remember these five tips so you can boot your project career and achieve the results you want.

Five Ways 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:

1. **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.

2. **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.

3. **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.

4. **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.

5. **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.

Five Steps to Hiring the Right Staff

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

Step 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.

Step 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.

Step 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.

Step 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:

- Perform personality, competency and numerical testing.
- Get them to send samples of work completed in the past.

- Ask them to perform specific project tasks. For instance, if hiring a software developer, get them to write you an example program.

- Perform a second interview with management.

- Get them to meet the team and allow the team to ask questions.

- Take them for lunch with your team and see how they socialize.

- Get them to do a formal presentation to your team.

- Seek 3 professional references, all from past employers.

- Ask them for 2 personal references, for character checking.

- Speak to their prior customers to confirm their competency.

Step 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.

Five Steps to Set Goals and Achieve Them

As a Project Manager, you have too much work to do and not enough time to do it in. With so much going on, you need to be really focused if you want to achieve success. The best way to get focused is to set 3 Project Goals and then work hard to achieve them. Here's how to do it...

Step 1: *Identify what's important*

In projects, everything is priority . So you need to take time to sit down with your Project Sponsor and identify what it is that is really important to achieve. Ask them this question: "If there were 3 critical things that the project had to deliver, then what would they be?"

The 3 things might be "delivering on time, under budget and to specification". Or it might be producing 3 key deliverables. Or they might be 3 major business benefits.

Step 2: *Set them as goals*

Then take these 3 important "things" and turn them into project goals. Remember to make your goals SMART - Specific, Measurable, Attainable, Realistic and Timely.

So why only have 3 goals? It's simple. With everything that goes on in your project, you will only ever remember 3 things long term. That's also why you need to keep them short and simple. If you set 5 or more goals, then you'll probably forget them within a week, making them harder to achieve.

Step 3: *Communicate them*

Print out your new goals and put them on your wall behind by your desk. Then take your team out for lunch and tell them what the 3 goals are and why they are important to achieve.

Then tell your other stakeholders about them, including any contractors, suppliers and business representatives that may be involved with the project. Make sure everyone in the project knows what has to be done and by when. Then you're all "on the same page" and working towards the same goal posts.

Step 4: *Set an Action Plan*

Having the goals in front of you every day will help, but you need to get serious and create an action plan to achieve them. Revisit your Project Plan and identify all of the tasks that will specifically help you achieve your 3 goals. These tasks are now the "high priority" tasks for the project and together, they form your "Action Plan".

Assign your best resource to these high priority tasks and make sure they have everything they need to achieve them.

Step 5: *Keep an Eye on Progress*

As a Project Manager, you can't watch everything. So just focus on the high priority tasks in your plan. Track their progress daily. Resolve any issues that arise with them, as quickly as possible. Personally oversee them if you need to. If they slip, then take quick action to bring them back on track. Do everything in your power, to make sure that these high priority tasks are completed on time, so that you can achieve your 3 goals and lead your project to success.

Five Ways to improve your Project Learning

Here are 5 great tips for learning more about *Project Management*...

1. **Get serious**

Whether you're a beginner or novice, you need to invest in formal training to boost your skills. So get serious and take the first step. Either enroll for a formal training course locally, or use learning tools so that you can learn from home when it suits you.

Then set aside 2 hours every week to sit down and read books, materials, articles and white papers about projects. By immersing yourself in the topic, you will spark ideas for your own projects that you can use to improve your success.

2. **Widen your scope**

Don't just stick to the classical theory of project management. Instead, widen your scope by reading materials that also cover managing people, money and equipment as well as suppliers, procurement and communications.

3. **Write it down**

If you're reading late at night, much of what you read will go in one ear and out the other. So every time you think "That's a good point!" write it down. Create your own "Learning Guidebook" and in it, record every tip that you've learned along the way. Then you can read your own guidebook as a refresher. Even better, you can use it to impart the knowledge you've gained to your team. Who knows, you could even publish it as a book!

4. **Get specific**

When you've spent a couple of months improving your knowledge of project management, you're ready to get specific. Write down the areas that you're weak in and get detailed materials on those topics. Remember that Project Managers are generalists. They need to know a lot about ALL of the topics in the management discipline. So if there are topics that you're weak on, learn more about them now.

5. **Reward your efforts**

By writing down your learning along the way, you'll quickly realize how valuable that information is to you. So feel proud of what you've learnt by rewarding your own efforts! Go out for a meal with friends, buy new clothes or do something special.

By rewarding your efforts, it will reinforce how important learning is to you. And it will motivate you to continue learning more each week.

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If you want *downloadable tools* so you can learn from home when it suits you, use MPMM Professional (www.MPMM.com) or the TenStep Methodology (www.TenStepPM.com). They include all of the content you need to learn Project Management to an advanced level.

Five Ways to Help your Team to Manage Project Stress...

We all know what stress is. It is the thing that makes your hair turn grey and your frowns appear more often than smiles. It is natural that projects attract a lot of stress, as you have a fixed set of deliverables to produce in a fixed timeframe and with fixed resources - and all with your project sponsor breathing down your neck!

Positive stress can be generated in an environment which boosts productivity and focuses your team on the end goal. But negative stress is another side-effect, which can demoralize staff, reduce efficiency and de-focus your team. In this type of environment, you need to turn negative stress into positive stress, and to do that, we have listed here some tips and hints to help:

Step1. Time-Out

Positive stress can only be generated when people within teams have positive relationships. And to create these relationships, the best way is through socializing. Whether it is taking the team out for regular lunches, drinks after work or a sporting activity, getting the team together so they can get to know one-another outside of the project environment is critical to dumping negative stress.

Step2. Rallying

Your team members have built positive relationships through taking time out to socialize together. Excellent! The next step is now to rally your team around a cause - your project goal!

Schedule monthly "get-togethers" at which you reiterate the project goals, congratulate them on their successes to date and boost their confidence in doing what it takes to complete the project successfully. Make sure that each person leaves the meeting energized and passionate about finishing the remainder of the project.

Step3. Boosting

Of course, rallying works fine for teams, but it is not enough for individuals. You need to "boost" every team member by making them feel good about themselves and allowing them to gain

confidence in completing the tasks assigned. You can do this by:

- Recognizing great performance when you see it

- Conducting staff reviews and providing positive feedback

- Offering bonuses for outstanding performance

- Reviewing salaries when applicable

- Introducing team awards and prizes

Step4. Pin-Pointing

Often stressed teams have an "instigator". This is a person (or people) who generate a lot of negativity and who influence the performance of others around them. You need to address these people directly.

When you conduct your staff performance reviews, make sure that the negativity of an instigator is identified in these meetings and agree with them on an action plan to help them to improve. Pin-pointing "stress points" or "weak points" in a team is one key element to ensuring project success.

Step 5: Self-Administering

Of course, to resolve team stress effectively, you need to be in the right "frame-of-mind" yourself. If you are negatively stressed, then those around you are likely to be also.

So to "practice what you preach" you need to feel up-beat and positive about the team. You need to feel fit and healthy, focused, yet inspirational! If you can achieve this frame of mind, then you can turn negative stress into positive stress and give your team a real chance at succeeding.

Nine Ways 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:

1. **Your boss** is frustrated with progress and takes it out on you openly, in front of others in your team.

2. **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.

3. **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:

4. **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.

5. **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.

6. **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.

7. **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.

8. **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.

9. **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.

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So that is it. Your experience may vary but these 9 ways should help you resolve project conflict.

Ten Ways to Get Recognition for your Projects

To be seen as a *successful* Project Manager, you need to boost your personal brand so that others see you in the same light as you do. Here are our top ten ways for doing this:

1. **Form the right relationships**

The first thing to consider is - who do you want recognition from? Whether it's your Manager or CEO, you need to build your relationship with them, ideally on both a personal and business level. Make them aware of your role, how critical it is to the business and why they should care.

2. **Set their expectations**

Tell them why your deadlines are hard to achieve and how limited your resources are. Make them know that the only way you can deliver your projects is through long hours and hard work. Only then will they truly understand the challenges you're faced with.

3. **Tell them how hard you're working**

Every boss expects their team to work hard. But you need to show them you're "going the extra mile" and why you're different than the other Project Managers in your organization. Make them know that you have challenging targets to meet and you're giving it your all.

4. **Shout out minor successes**

Don't wait until you're finished your project before you promote it. Take a small success and tell people about it. Even if your project is delayed and the team are under pressure, shout out about any small successes you gain to make your managers know that you're doing a good job.

5. **Report progress**

Report the progress of your project as frequently as you can to show it's got momentum and give your managers the feeling that you're progressing well.

6. **Focus on what's ahead**

Sure, you might be running late—but instead of dwelling on the current state, focus on the work you're doing to get it back on track. So always communicate the positive side of the situation to your manager, so it looks to them like you have it all under control. And if you don't have it under control, then follow tip 7 below...

7. **Ask for support**

Don't ever be afraid to ask for support from your Manager and to tell them the absolute truth. You might need more time, people, equipment or even advice from them. By getting their support regularly, you're actually getting more buy-in from them for your project. And it's another chance to use the tips above to show them how hard you're working.

8. **Giving a "Heads Up"**

Keep your manager informed regularly by giving them a "heads up" when critical issues come up. Never let them wait to read about issues in a Project Status Report or meeting. Tell them early about any news, so they have time to digest it before you seek their feedback.

9. **Celebrate big wins**

Great, you've delivered on time, under budget, or at least one of the two. So go ahead and celebrate it celebrity-style. Throw an office party, shout morning tea or at least take the team and your manager out to lunch. Promote it on your company newsletter, take photos and consider a press release. Now is your time to shout out your success from the rooftop, instead of just getting caught up in the next project ahead. Remember—people only get reward and recognition for successes, if they are visible. The more visible they are, the greater the reward and recognition you'll receive.

10. **Be direct**

After your celebrations, revisit step 1. Take those you want recognition from out for lunch. Tell them how hard the targets were to meet and what you've achieved. Tell them what it took to do it. Then tell them about your next project and get their support for it. This ensures you get their continued buy-in, and it spins off the reward and recognition you deserve.

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And there you have it—our top ten tips for gaining recognition for your projects.

Remember, recognition and reward come hand-in-hand with success. So it's up to you to show others why you're successful and deserve reward and recognition for your efforts.

Ten Tips for Boosting Team Performance

There are lots of different ways that you can boost your team performance. We've listed here our top ten tips. We hope they help you...

Tip 1: Show them the vision

People only perform well in a role if they understand what it is that they need to deliver and why. For this reason, we suggest you get your team together to reinforce the project vision, objectives, timeframes and deadlines. Make your team feel wanted and needed by showing them that the project is critical to the success of the business. You will gain their buy-in and their commitment going forward.

Tip 2: Meet them individually

After your meeting, take each team member aside and tell them what it is that you need from them to help you deliver the project. Make sure they have a clear Job Description and they know how you are going to measure their performance. Ask them how they like to be managed, what motivates them and how you can support them in their role.

Tip 3: Give them room

At this point, you need to back off a little and give them room to perform. And if the pressure increases in your project, you need to give them more room than less. It's hard to do this, but you mustn't over-pressurize them or their performance will reduce, rather than improve.

Tip 4: Count the goals

As you back off, you need to put in place checks to measure their performance regularly. Meet with them individually every month to discuss their achievements, what's outstanding and how they can improve. Make sure you don't "bottle up" your concerns. Instead speak to them openly, keeping constructive at all times.

Tip 5: Be positive

If you're stressed and weary, ease off on your staff. Shouting or being negative will only rub off on them. It's incredibly difficult but you need to be positive, reassuring and supporting them at all times, even if the project is delayed.

Tip 6: Shake hands and pat backs

It's easy to forget to praise your team's successes. So every time you deliver a great quality product, finish a difficult task on time or get great feedback from a customer—congratulate those responsible in your team.

Tip 7: Meet at half time

Get your team together regularly to build a strong team spirit. Get them socializing together, so that new friendships are formed. The stronger the bond your team have with each other, the more likely they will work together as a single cohesive unit and achieve the objectives you have set.

Tips 8: Take time out

Don't be afraid to give team members time off for working hard. By taking time out, it will reduce sick leave, improve motivation and increase efficiency.

Tips 9: Give them what they need

Everyone is motivated by different things. You need to know what motivates every different member of your team. Get to know them well. If you can reward each person differently based on their motivations, then you'll improve their performance every time. This is the hardest trick in the book, but the one that pays the biggest dividends.

Tip 10: Celebrate your wins!

Staff all too often finish a project and move straight onto the next one without celebrating its success. When they do this, they carry their stress and pressure into the next project they work on. So help your team to "start afresh" by celebrating your success at the end of the project.

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By taking these 10 tips seriously, you will improve the performance of your team and boost your chances of success.

Eleven Ways to Lead Your Projects

The main difference between a leader and a manager is that a "leader" is responsible for setting the goals and motivating the team to achieve them. Whereas a manager is responsible for co-coordinating the work to achieve the goals set.

Take these tips to boost your leadership skills today:

1. **Set goals:** Start by setting clear project goals and timeframes for achieving them. Then create a crystal clear roadmap for your team so that every person in your team knows what has to be done and by when. Use a project methodology to help you do this.

2. **Be passionate:** You then need to be passionate about achieving your project goals. It's passion that will drive the project to success. If you are passionate, then your team will be as well.

3. **Be focused:** If you want others to follow you, then you need to be incredibly focused on achieving your goals. You need to be the hardest worker and most highly driven person in the team, if you want to inspire others to follow you.

4. **Identify values:** You need to think about the values you want to portray as a leader, and once you've identified them—you need to stick to them. Good values to have as a leader include openness, honesty, trust and integrity. Remember, your values define who you are as a person. Strong values are critical to strong leadership.

5. **Your leadership:** You need to think about your leadership style, and then make sure you follow it. So how do you want others to perceive you? Do you want them to see you as hard or soft, formal or informal, strict or relaxed etc. Remember that your leadership style needs to fit in with your personal nature, and it also needs to fit with your team.

   People will only follow your lead if you set a great example. They need to trust and believe in you as a person, not just because of the role you have. So here's how to earn people's trust and belief in you:

6. **Secure commitment:** Start by meeting each team member individually and telling them how important their role is to the project. Make them feel valued and gain their commitment to achieving success.

7. **Set achievable goals:** Set each person 3 goals to achieve within a reasonable timeframe. Involve them in the goal-setting exercise to secure their buy-in. Then review progress along the way.

8. **Reward great performance:** If they achieve their goals, let them know that they've done a great job and that you're proud of them. Then reset more goals, for the next period ahead.

9. **Get personal:** Get to know your team on a personal level. Learning more about what it is that motivates them will be invaluable to leading them towards the goals you've set.

10. **Be supportive:** You need to be there for them when they need you. Whether personal or work-related, support them as much as you can.

11. **Be positive:** Always try and be positive when dealing with them. Only by looking at the positive side of everything will you inspire people to achieve their best.

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That is how you lead your projects.

Manage Quality

Three Steps to Implement a Quality Management Process

Being a Project Manager is a tough job! You not only have to produce the deliverables on time and within budget, but you also need to ensure that they meet the quality expectations of your customer. To do this, you need to define and execute a Quality Management Process.

By implementing a quality process within your project, you will not only be able to control the level of quality of your deliverables, but you can also provide your customer with assurance that the project will result in a solution which meets their expectations.

Perform the 3 steps below to implement a Quality Management Process for your project.

Steps 1: Create a top notch plan

Before you begin to measure quality within your project, you should first create a Quality Plan clearly setting out the quality targets to be achieved. The quality targets defined should be agreed with your customer, to provide a solid foundation for measuring the overall success of the project.

Steps 2: Control the quality of your deliverables

During the execution of your project, you will need to closely monitor and control the quality of each deliverable being produced to ensure that it meets the quality targets set. You can use the following techniques to control the quality of deliverables for your project:

- You can ask staff to review each other's deliverables to determine how closely they align with the quality targets set. This technique called "Peer Reviews" helps staff to identify the additional activities required to complete their deliverable and meet the requirements of the customer.

- If you have a Quality Manager assigned to your project, then they will want to perform formal "Deliverable Reviews" for each deliverable as it is nearing completion. These reviews will provide the Project Manager with an overall view of the status of each deliverable and enable them to correct any quality deviations identified.

- Phase Reviews can be completed by the Project Manager at the end of each project phase, to ensure that all of the deliverables produced by the project meet the defined quality targets.

Steps 3: Assure your customer of success

While monitoring and controlling the quality of deliverables within your project, you should consider providing your customer with assurance that their requirements will be met. The easiest way to do this is to allow an independent person (appointed by your customer) to regularly review your project and give their "thumbs-up" by stating that the deliverables being produced are in accordance with the quality targets set.

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Not only will this provide your customer with assurance that you are "on track", but it will also place onus on the customer to raise any foreseen quality issues early in the Project Lifecycle — thereby providing you with more time to correct any quality issues identified and continue on with the delivery of the project.

Three Steps to Getting Customer Acceptance for Projects

Acceptance Management is the process of reviewing deliverables within the project and gaining the customer's acceptance that they are 100% complete. By gaining customer acceptance for each deliverable produced, you can:

- Identify customer acceptance issues early in the project

- Improve deliverables to meet a customer's requirements

- Maximize customer confidence in the delivery of the project

- Keep customers happy and increase your chances of success

To perform Project Acceptance Management, complete these steps:

Step 1: Complete your Deliverables. The first step in the Acceptance Management Process is to identify the completion of each project deliverable. The project team members inform the Project Manager that a deliverable is complete and is ready for acceptance testing.

Only when the Project Manager considers that deliverable to be complete in its entirety is an Acceptance Test initiated. The Project Manager might opt to perform the test immediately. Or, depending on the size and complexity of the deliverable, he or she may wait until other related deliverables are also complete and test the entire group simultaneously. Many Project Managers wait until the end of the Execution phase before they perform Acceptance Tests.

Step 2: Perform Acceptance Testing. The Project Manager schedules acceptance tests for deliverables produced by the project. These tests involve reviewing each deliverable to determine whether it meets the criteria stated in the Acceptance Plan. There are various testing methods you can use, including:

- Physical inspection of the deliverable

- Third party audit of the deliverable

- Analysis of the processes used to create the deliverable

- Review of Project Plan to determine the time spent creating the deliverable

- Review of Financial Plan to determine the cost of creating the deliverable

- Review against the Quality Plan to determine the quality of the deliverable

To increase your chances of gaining customer sign-off, you may wish to involve the customer in the acceptance testing process itself. This gives the customer additional confidence that the deliverables meet the acceptance criteria and that the testing methods used to determine the completion of each deliverable are comprehensive and effective.

After the acceptance test is complete, the Project Manager commissions any additional work needed to meet specified acceptance criteria. Upon completion of that additional work, the deliverable is re-tested to determine whether it has achieved the required level of quality. This process continues until the deliverable is ready for customer sign-off.

Once the testing is complete and the deliverable is ready for sign-off, the Project Manager completes an Acceptance Form, which describes the acceptance criteria and the overall results of the acceptance test. This should give customers confidence that deliverables meet their requirements in full and should be accepted as 100% complete.

Step 3: Gain Customer Acceptance. The customer reviews the Acceptance Form and decides to either:

- Commission their own acceptance test

- Request further information about the testing activities

- Not approve the deliverable and raise a formal project issue

- Approve the deliverable as 100% complete

Throughout the Acceptance Management Process, the Quality Manager keeps an Acceptance Register up-to-date to allow the Project Manager to monitor and control acceptance of project deliverables.

Four Critical Steps to Creating a Quality Plan

To ensure that your deliverables meet your customer's 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 customer's 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 taken 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 Management Process to ensure that each of the actions listed in the Quality Plan is taken as quickly and efficiently as possible.

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That is how you create a Quality Plan.

Five Ways to Document an Acceptance Plan

The key to a successful project is gaining acceptance from the customer that each deliverable produced meets (or exceeds) his/her requirements. To clarify the criteria used to judge each deliverable for customer acceptance, an Acceptance Plan is produced. The Acceptance Plan provides the criteria for obtaining customer acceptance, a schedule of acceptance reviews within which customer acceptance will be sought and a summary of the process used to gain acceptance of each deliverable from the customer. An Acceptance Plan should include:

1. A list of the milestones to be achieved and deliverables to be produced

2. A set of criteria and standards for the acceptance of deliverables by the customer

3. A plan outlining how the deliverables will be reviewed to determine whether or not they meet the criteria and adhere to the standards set by the customer

4. A process for gaining customer acceptance once the deliverables have been produced.

5. To request the formal acceptance of a particular project deliverable, an Acceptance Form should be used. An Acceptance Form should include:

   - Details of the deliverable, requester and request date

   - A list of acceptance criteria / standards to be met

   - A summary of the results of the acceptance testing taken to determine whether or not the deliverable meets the criteria and standards specified

   - A section allowing customers to approve deliverables.

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That is what an acceptance plan includes.

Five Actions to Perform Quality Management

Quality is defined as "the level of conformance of the produced deliverables to the customer's requirements". Quality Management is the process by which the quality of each deliverable is assured and controlled for the project, using Quality Assurance and Control techniques.

The Quality Management Process entails using a variety of review techniques to assess the level of quality of deliverables and processes and implementing a set of actions to raise the level of quality within the project. The following steps are taken:

1. List the quality targets from the Quality Plan

2. Identify the types of quality measurement techniques required

3. Measure deliverable and process quality via Quality Assurance and Quality Control techniques

4. Take action to enhance the level of deliverable and process quality

5. Report on the level of quality attained to management.

Examples of preventative Quality Assurance techniques include researching historical quality issues on projects, ensuring adequate definition of requirements, recruiting appropriately skilled staff and performing Quality Assurance Reviews. Types of Quality Control techniques include Peer Reviews, Deliverable Reviews, documentation reviews, Stage-Gate Reviews and Process Reviews.

Manage Procurement

Four Steps to Define a "Terms of Reference (TOR)"

The TOR describes the project vision, objectives, scope, organization and overall implementation plan. It helps you to set the direction for the project and gain buy in from your stakeholders as to how the project will be organized and implemented. It will also help you to control the scope of your project, by defining exactly what it is that you have to achieve. A TOR may also be referred to as a Project Charter or Project Definition Report.

To define a comprehensive TOR for your project, take the following steps:

Indentify the Project Vision → Describe the Project Organization → Plan the Approach to Implementation → List the Risks and Issues
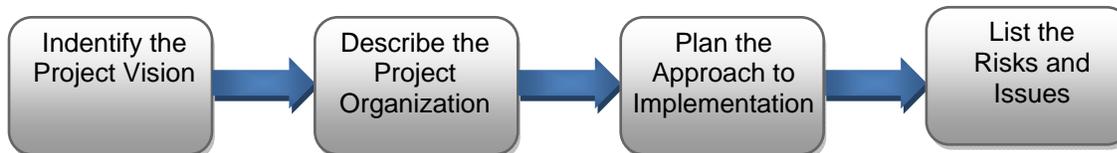
Step 1: Identify the Project Vision

- **Vision:** The first step taken when defining a TOR is to identify the project vision. The vision encapsulates the purpose of the project and is the defined end goal for the project team.

- **Objectives:** Then based on the vision, list three to five objectives to be achieved by the project. Each objective should be Specific, Measurable, Achievable, Realistic and Time-bound (SMART).

- **Scope:** With a clear view of the Vision and Objectives of the project, it's time to define the project scope. The scope defines the formal boundaries of the project by describing how the business will be changed or altered by the project delivery.

- **Deliverables:** Then you need to describe each of the deliverables that the project will produce.

By defining the vision, objectives, scope and deliverables, you now have a solid view of the purpose of the project and the outcome to be achieved.

Step 2: Describe the Project Organization

The next step is to identify how the project will be structured by listing the customers, stakeholders, roles, responsibilities and reporting lines.

- **Customers:** First, identify the project customers. A customer is a person or entity that is responsible for accepting the deliverables when the project is complete.

- **Stakeholders:** Then identify the project stakeholders. A stakeholder is a person or entity within or outside of the project with a specific key interest or stake in the project. For example, a Financial Controller will be interested in the cost of the project, and a CEO will be interested in whether the project helps to achieve the company vision.

- **Roles:** Now list the key roles involved in delivering the project. Examples of roles include the Project Sponsor, Project Board and Project Manager. Then summarize each of the primary responsibilities of each role identified.

- **Structure:** Once you have a clear view of the roles needed to complete the project, you can depict the reporting lines between those roles within a Project Organization Chart.

Step 3: Plan the Approach to Implementation

You're almost there! You now have a solid definition of what the project needs to achieve and how it will be organized to achieve it. The final step in creating a TOR is to describe the implementation approach.

- **Implementation Plan:** To provide the Customer and Stakeholders with confidence that the project implementation has been well thought through, create an Implementation Plan listing the phases, activities and timeframes involved in the project.

- **Milestones:** In addition, list any important milestones and describe why they are critical to the project. A milestone is typically an important project event, such as the achievement of a key deliverable.

- **Dependencies:** List any key dependencies and their criticality to the project. A dependency is defined as an activity that is likely to impact on the project during its life cycle.

- **Resource Plan:** Summarize the resources involved in the project by listing the labor, equipment and materials needed.

- **Financial Plan:** Then budget the financial resources required to complete the project.

- **Quality Plan:** Briefly describe the management processes involved in monitoring and controlling the project delivery.

- **Completion Criteria:** Next, list the criteria for project completion. Once these criteria have been met, the project will be considered complete and ready for closure.

Step 4: List the Risks and Issues

The final step taken to complete your Terms of Reference is to identify any project risks, issues, assumptions and constraints related to the project.

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And that's it. If you complete each of the steps above, then you will create a solid Terms of Reference for your project, helping you to manage scope and deliver consistently on time and within budget.

Five Steps to Complete a Request for Information

At some point in your career as a Project Manager, you will need to appoint a preferred Supplier to your project. Finding the right Supplier to deliver the right goods and services at the right time is always a challenge. To ensure that you appoint the best Supplier available, you need to perform a formal Tender Process.

The first step in the Tender Process is to document a Statement of Work (as described in our previous newsletter) which describes the procurement requirements of the project. Now that you have clearly described your procurement requirements, you need to give potential Suppliers in the industry an opportunity to register an interest in becoming the preferred Supplier for the project. You can achieve this by creating and releasing a comprehensive Request for Information (RFI) document to the market.

An RFI describes the process for allowing Suppliers to register an interest in supplying goods and services to the project. It also describes the information required of each Supplier to enable to project team to create a Supplier shortlist.

In summary, there are 5 key steps involved in creating and releasing an RFI:

1. **Document a Statement of Work**

(SOW) which lists the goods and services to be obtained from an external Supplier

2. **Document a Request for Information**

(RFI) which describes the process for Suppliers to register an interest in supplying product to the project... It also describes the information required of each Supplier to allow the project team to determine their strengths and weaknesses and thereby select a Supplier shortlist.

3. **Release SOW and RFI to the general market**.

This is usually done by advertising in newspapers, trade magazines and tender distribution lists. The adverts summarize the procurement requirements of the project and describe how an interested Supplier may obtain a copy of the SOW and RFI to read through. Once interested Suppliers have obtained and read the SOW and RFI, they create a formal response and forward it to the project team for consideration

4. **Receive and Evaluate Tender Responses**.

The project team review each response and rate it based on the ability of the Supplier to meet the procurement requirements of the project.

5. **Select Tender Shortlist and notify Suppliers**

Based on the overall rating of each response...Usually the top 3-5 tender responses will be selected to proceed to the 'Supplier Proposal' stage.

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That is how you create and release an RFI.

Five Suggestions to Complete a Supplier Contract Document

Almost all Project Managers at some point in their career seek the assistance of external suppliers to help them to complete a project. To ensure that those suppliers provide the project team with the right deliverables, at the right time and to the right level of quality—you need to create a Supplier Contract. This contract is:

"An agreement between the Project and Supplier for the acquisition of a defined set of deliverables to meet the requirements of the Project"

The contract specifically defines the deliverables to be produced, the responsibilities of both the Supplier and Project, the performance criteria to be met by the Supplier and any terms and conditions applicable.

Documenting a comprehensive Supplier Contract is critical to ensuring that you get the most out of your supplier relationship. To create a detailed Supplier Contract for your project, we suggest that you create a document which includes the following sections:

1. Introduction

Describe the purpose of the Supplier Contract and define any commonly used terminology

2. Deliverables

Explicitly list the deliverables to be provided by the supplier to the project. For each deliverable, list the quantity to be provided by the supplier and the price of each deliverable to be supplied. You will also need to include a detailed delivery schedule which lists the timeframes for supplying the deliverable to the project team.

3. Responsibilities

List the responsibilities of both the supplier and the project team for producing and receiving the deliverables. Creating a detailed list of responsibilities is an extremely important section within a Supplier Contract, as you will refer to it throughout the project when you assess the supplier's performance.

4. Performance

To help you to measure the ongoing performance of the supplier, you will first need to define the criteria that will be used to assess their performance. For instance, you may wish to ensure that the supplier provides all of the deliverables specified and performs all of their responsibilities listed within this contract. Also make sure that you clearly specify the process for performing supplier performance reviews, so that both parties have clear understanding of the entire performance management process.

5. Terms and Conditions

And finally, list the terms and conditions for invoicing, payment, termination, disputes and indemnity.

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*If you create a contract which includes all of these sections, then you can feel comfortable that you will gain the maximum benefit from your supplier relationship.

Ten Steps for Vendor Selection

One of the most difficult decisions a Project Manager has to face is selecting the right supplier to partner with, to complete a project. To select the right supplier 'fairly and squarely', a lot of hard work and effort needs to go into running a formal Tender Process..

The key to running a successful Tender Process is to document in detail how it will be taken **before** you initiate it. Your Tender Process document should include the following 10 steps:

1. **Create a SOW**

The "Statement of Work" (SOW) defines the requirements of the project, to enable potential suppliers to determine if they can meet those requirements.

2. **Create an RFI**

The "Request for Information" (RFI) describes the information required by the project, to select a shortlist of suppliers for further evaluation

3. **Release the RFI**

The RFI and SOW are released to the marketplace to inform potential suppliers of the project requirements (outlined in the SOW) and the format of the required response (outlined in the RFI)

4. **Evaluate the responses**

The supplier responses are received and evaluated based on their ability to met the project's requirements stated within the SOW

5. **Select a shortlist**

The responses with the highest scores are added to a supplier shortlist

6. **Create an RFP**

The "Request for Proposal" (RFP) describes the information required by the project to select the preferred supplier. Examples of information required include the supplier's company details, their product offerings and delivery approach

7. **Release the RFP**

The RFP is released to the shortlist of suppliers to allow them to submit a detailed proposal to the project

8. **Evaluate Responses**

The proposals are received and evaluated against the requirements outlined in the SOW

9. **Select Preferred**

The proposal with the highest score is then selected and the preferred supplier is asked to enter into a contract

10. **Agree Contract**

A formal supplier contract is drafted by the project and after negotiation, is agreed with the supplier

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That is how you run a successful Tender Process.

Ten Steps to Complete a Statement of Work

It's well recognized that partnering with high performing Suppliers is critical to delivering successful projects. Whether you're hiring a Supplier to; deliver equipment, provide consultancy or simply make the coffee—the key is to document your requirements for their delivery upfront, within a "Statement of Work". Without a detailed Statement of Work (SOW), it will be difficult to manage your Suppliers performance, as you will not have a clearly laid out set of requirements upon which to base their performance.

Although you may have a formal Supplier Contract in place, the contract will most likely specify the major deliverables and timescales to be achieved, but it probably won't list the specific procurement requirements of your project in detail.

We suggest that you create a detailed SOW as the first step in a Tender Process. It should be created before a short-list of potential Suppliers is identified and long before a Supplier Contract is agreed. The SOW is used to:

- Define the procurement requirements of the project in detail.

- Act as the basis upon which to short-list Suppliers and select a Preferred Supplier to the project

- Identify the Suppliers deliverables in the contract

- Measure the actual performance of the Supplier against the contract

It may sound like a lot of work, but creating a detailed Statement of Work is not too difficult a task. Complete the following steps to create a comprehensive SOW for your project:

1. Describe the **Company** profile that the Supplier must fit. For instance, you may wish only to work with Suppliers over a certain Company size, with experience providing certain types of products and a detailed knowledge of your industry and local market. You may also require that the Supplier has a certain number of years experience and clients who can to act as referees.

2. Provide a detailed description of the **Products** (goods and services) to be provided by the Supplier. For each product, describe in detail its components (if a 'good') as well as any skill-sets required (if a 'service').

3. Identify the **Training** required by your project team, to ensure that maximum benefits are gained from the goods and services provided by the Supplier.

4. List any **Documentation** to be supplied, such as an Operating Manual, User Guide, Business Processes or Technical Support Procedures.

5. Describe the level of **Support** required of the Supplier by specifying the support hours needed and the level of support to be given.

6. Include any **Materials and Equipment** to be provided by the Supplier to the project team.

7. Clearly state the **Deliverables** to be produced by the Supplier and the dates within which deliverables must be complete.

8. Describe the process for **Acceptance** of each deliverable, to ensure that deliverables are formally reviewed and accepted by the project team before they are deemed 'complete'.

9. Identify the conditions for making **Payment** to a Supplier for goods and services rendered.

10. And last but not least, make sure you protect the intellectual property included within the SOW document by providing a suitable **Confidentiality** and Non-Disclosure clause.

And that's it. If you complete each of the steps listed above, you will create a comprehensive Statement of Work which can be used to get the most out of your Supplier relationship.

Close Project

Three Steps to Create a Project Closure Report

The Project Closure Report allows you to document the reasons for closing the project, as well as the steps you intend to take to do it properly. There is a lot of ground to cover—so we've set out here each of the sections you need to include within a Project Closure Report, to help you to do it quickly and efficiently:

Section 1: Completion Criteria

Before you take action to close the project, you need to determine whether all of the project closure criteria have been fully satisfied. For example:

- Has the project vision been achieved?

- Have all the project objectives been met?

- Has the project resulted in the stated benefits.

- Have all of the deliverables been produced?

You will need to perform a formal review of the project to determine whether these criteria have been met. The Project Board may want to see proof, so you're best to attach the detailed results of the review to your Project Closure Report once completed.

Section 2: Outstanding Items

If you're confident that the project has met all of the completion criteria, then the next step is to list any outstanding items. These are typically activities listed as incomplete on the Project Plan. However, they may also be risks, issues or general items that are outstanding and require attention.

As you list each outstanding item, you also need to identify the actions that are needed to fully resolve them.

Section 3: Closure Actions

After determining that the project is ready for closure and listing the outstanding items, you can now list all of the actions needed to close your project. These actions may include:

- Handing over the final deliverables to the customer

- Collating and filing all project documentation

- Terminating all supplier contracts and contractors

- Releasing project staff, equipment and materials

- Communicating the closure of the project to stakeholders.

Once you have completed the 3 sections above, you're ready to complete a Project Closure Report. After completion, the report is presented to your Project Sponsor for signoff.

By getting your Project Sponsor to sign-off on the Project Closure Report, it gives you senior management approval for the completion of the project.

It also gives you the authority needed to complete your closure actions quickly and efficiently, thereby increasing your chances of success. Download a Project Closure Report template now.

Five Steps to Performing a Post Implementation Review

You may have heard of the term PIR? Basically, a Post Implementation Review (or "PIR") is the term used to describe a formal review of a project, after it has been completed and formally closed. The purpose of a PIR is twofold: to review its actual level of success, and to gain valuable lessons learned for future projects. To conduct a PIR quickly and efficiently, you need to take these 5 key steps:

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┌──────────────┐     ┌──────────────┐     ┌──────────────┐     ┌──────────────┐
│   Review     │ ──▶ │   Review     │ ──▶ │  Identify    │ ──▶ │  Identify    │
│  Project     │     │  Project     │     │  Project     │     │  Project     │
│ Performance  │     │ Conformance  │     │ Achievements │     │  Failure     │
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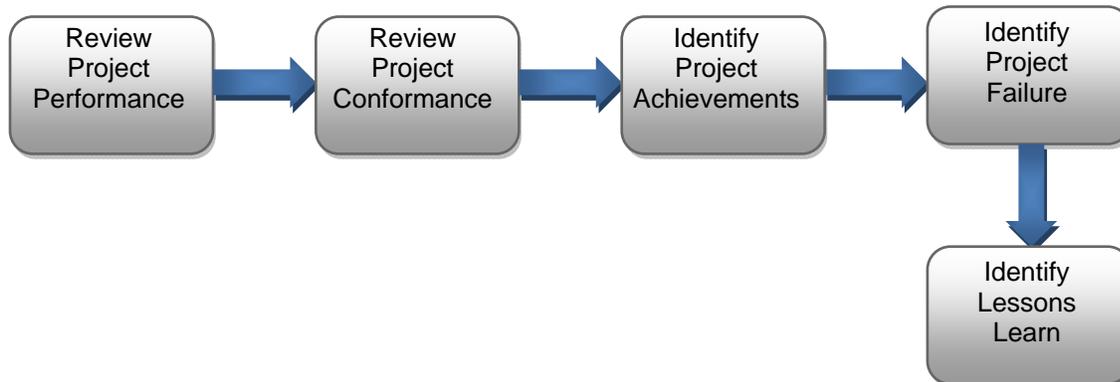
First, you will need to review the overall performance of the project, to determine whether it has delivered the benefits, met the objectives, operated within scope and produced the deliverables on time, within budget and using the allocated resources. You will then need to determine whether the project has conformed to the management processes initially set out. And finally, you should identify the key project achievements, failures and any lessons learned for future projects. Here's how to do all of this, in 5 simple steps:

Step 1: Review the project performance

To start, you need to determine how the project performed against each of the targets defined during the Initiation phase. You should identify whether the project:

- Delivered the business benefits in the Business Case

- Achieved the objectives specified in the Terms of Reference

- Remained within the scope defined in the Terms of Reference

- Produced the deliverables defined in the Terms of Reference

- Met the quality targets defined in the Quality Plan

- Completed within the planned project schedule

- Delivered within the budget defined in the Financial Plan

- Met the forecast resource levels defined in the Resource Plan

Step 2: Review the project conformance

Next, identify the extent to which the project has conformed to the following management processes initially defined:

- Time Management

- Cost Management

- Quality Management

- Change Management

- Risk Management

- Issue Management

- Procurement Management

- Acceptance Management

- Communications Management

Step 3: Identify project achievements

Next, list the major achievements for the project and describe the positive effect that each achievement has had on the customer's business.

Step 4: Identify project failures

List any project failures and describe the effects they have had on the customer's organization.

Step 5: Identify lessons learned

Describe the lessons learned from performing this project and list any recommendations for similar projects in the future.
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It's that simple.

Six Parts of a Post Implementation Review

The Project Closure phase involves distributing the final deliverables to the customer, releasing project documentation to the business, terminating supplier contracts, releasing project resources and communicating the closure of the project to all stakeholders. The last remaining step is to complete a Post Implementation Review to quantify the overall success of the project and list any lessons learned for future projects. A Project Closure Report is created and submitted to the Customer for approval.

A Post Implementation Review should then be conducted to determine how well it performed against the objectives and conformed to the management processes specified. It should outline whether he project:

1. Achieved the objectives outlined in the Project Charter

2. Completed the entire scope of work

3. Produced deliverables specified within the Project Charter

4. Delivered within the schedule outlined in the Project Plan

5. Delivered within the budget outlined in the Financial Plan

If the project did not fulfill its expectations, the reasons should be documented. The results of the Post Implementation Review should be circulated to a PMO or posted in a place where others can learn from the experiences.