Project Manager’s Guide to Getting Things Done

PART 1/2

How to set goals, organize teamwork, and measure success
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Congratulations, you’re about to start working on your new project. Everything is set for success. You’re eager to get going, but conscious of the challenges ahead. How will you boost team spirit and get everyone going? How will you manage numerous deliverables and timelines? Are you afraid of being overwhelmed with new responsibilities? If so, you’re not alone.

It’s getting tougher for everyone to manage projects in the modern world. Teams are increasingly dispersed across departments, external partners, time zones and geographies. Collaborating on tasks and keeping track of who is working on what and when can be tricky.

So how is it possible to get things done in a smart way? Based on insight from three of our project management experts, we’ve developed a two-part eBook series to help you manage projects and get things done together with your team.

You’ll find tips on how to plan a project, best practices for smart, successful project management and collaboration, and advice on tools to help you execute your plan.

Projectplace, a part of Planview, is a leading project collaboration tool. It pioneered the industry when launched almost 20 years ago.

Introducing the project gurus

Karolina Jackson-Ward has two decades of experience working with various IT businesses on efficient collaboration and leadership.

Jason Morio has worked extensively in the start-up and entrepreneurial space, focusing on strategy and delivery.

Mia Nordborg is a frequent speaker about Lean, Agile, Kanban and change-management techniques.
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Planning and Strategy
Set the stage

A lack of clear direction is a common cause of project inefficiency. If you’re building a website or planning an event, for example, you need to visualize the end result and work out how you’re going to get there. Without tangible goals, people procrastinate or spend time on non-essential tasks.

“Dare to challenge your stakeholders early on. What are the hard requirements, the MVP (minimal viable product)? What are the things that must happen? Are the milestones the stakeholders think are necessary realistic in the timeframe? Can they be split up incrementally to make it easier and quicker to deliver on the whole project? The planning stage is the best time to review these things and manage expectations.”

Begin with your stakeholders, what do they expect?

Mia Nordborg
Plan – but stay flexible

As anyone who has ever managed a project will know, plans evolve. Whether it’s the scope of the project or the timeframe, change is inevitable. So as a project team, you must be agile and responsive. Create a strategy based on the overall objectives and the project or initiative timeline. Answer the question: What path in the long term would enable you to reach your goals?

Karolina Jackson-Ward

“Don’t make detailed plans for too far into the future. You might feel so committed that you stick to the plan too rigidly – at the expense of the project’s smooth running or at risk of not delivering. Adjust your long-term plan on a regular basis and keep the more detailed planning, who’s working on what and when, to a 1-2 month time horizon.”

Jason Morio

“Account for unforeseen additions to the workload. People get sick. Things take longer than expected. The client goes on holiday for a week without telling you. Pad out your timelines in anticipation of this. Set shorter term milestones to enable you to adapt to change and ensure your project keeps moving forward.”
Teamwork
Let your team plan the details

Whether you like it or not, it’s your team who are the actual experts. They all have their specific roles and skill sets. Clarify the goals with your team and give them direction as outlined during the setup phase. Let them do what they do best and work out how to get the job done.

“When starting a project, outline the overall tasks that need doing in order to reach the project goals. As a next step, let your team self-organize and break these tasks down into individual steps that have tangible deliverables due at specific times.”

Karolina Jackson-Ward
Communicate – always!

Create a transparent climate within the team. Make information accessible and visual. Letting your team and stakeholders know what the plan is and how everything is coming along means they’ll feel more involved and invested in the outcome.

“You need a centralized platform to facilitate communication within your team, so that people can share updates and ideas with each other even if they aren’t in the same place. This way everyone knows what tasks need to be done, when tasks have been completed, whether something is falling behind or if extra help is needed.”

Mia Nordborg
Prioritize

When you're in charge of a project one of your main jobs is to decide **what needs to be done and when**. But prioritizing tasks is often one of the hardest parts of the role. With so many different things that need to be done, how do you and your team choose what needs to be done now, or what can wait until next week?

There are several ways to prioritize work. **Stephen Covey’s Four Quadrants** is one.

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How to prioritize?

Covey’s time management grid differentiates between urgent and important activities:

<table>
<thead>
<tr>
<th>URGENT</th>
<th>NOT URGENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>IMPORTANT</strong></td>
<td><strong>NOT IMPORTANT</strong></td>
</tr>
<tr>
<td>- Deadline-driven projects</td>
<td>- Planning</td>
</tr>
<tr>
<td>- Crises</td>
<td>- Relationship building</td>
</tr>
<tr>
<td>- Interruptions</td>
<td>- Escape activities</td>
</tr>
<tr>
<td>- Non-project emergencies</td>
<td>- Irrelevant email</td>
</tr>
<tr>
<td>- Low value reports, meetings</td>
<td></td>
</tr>
</tbody>
</table>

1 Covey’s Four Quadrants for time management (Brefi Group).
It’s easy to get swept up with urgent tasks – they’re often crises coming from someone saying, I need this fixed right now! But they might not be the tasks that bring you closer to the goal you’re trying to achieve.

“Interrogate all tasks thoroughly to decide what priority they take. What’s going to be difficult to do? What’s going to help you make the next deliverable? Make sure your team delivers on items that will bring value to the customer or stakeholders. Even if it means challenging the stakeholders’ preconceived notions about what needs to be done.”

Karolina Jackson-Ward
Break it down

Large or complicated project tasks can often feel too challenging to tackle – leaving team members feeling demoralized and unenthusiastic about taking on further tasks.

“Split a big task into smaller, less daunting steps, each with a clear deliverable and deadline. It means tasks are easier and quicker to complete. It also means you and your team can enjoy the psychological exhilaration and relief of crossing something off the to-do list.”

Jason Morio
Stop starting, start finishing

Too many things on your to-do list won’t help your team get things done either. Even more demoralizing than a task too big to tackle is a multitude of little tasks too numerous to complete.

Manage one task at a time.

“Get your team to focus on completing a single task or goal before starting a new one. If you start something, finish it. Don’t get dragged into juggling tasks. This gives you and your team the focus to deliver your best work whilst avoiding procrastination.”

Set Work-In-Progress (WIP) limits for your team.

“Avoid bottlenecks. People can only handle so many commitments at a time. Limit and prioritize the number of active tasks any one team member can have at a time. Setting WIP limits will help your team to focus and prioritize the most important tasks.”

Mia Nordborg

Karolina Jackson-Ward
Have regular, short catch-up meetings with your team

Every day, gather your team around a whiteboard and have a stand-up meeting. Keep it quick and simple – you just want everyone to talk about the tasks they did yesterday, what they’re working on today and if there’s anything they need help with.

Jason Morio

Daily catch-ups shouldn’t last any longer than ten-fifteen minutes.

“The point is to start the day by focusing the team on what they’re doing and why. It helps you catch any issues early so your team isn’t wasting time. You don’t need to deal with any problems then and there, you can address them outside of the meeting.”
Tools and Technology
Create a virtual office

As people’s work becomes more fragmented across projects, locations and platforms, successful project management becomes more about awareness than control. Besides obvious advantages such as time savings and more efficient collaboration, a joint workspace can also give you an overview of everyone’s commitments within the context of the project as a whole.

Jason Morio

“It’s essential to have a single, centralized platform where everyone can get a joint picture of the whole project wherever they are. A place where all important documents are stored, where it’s easy to see all deliverables, tasks and deadlines, as well as who’s responsible for what, where the team can easily communicate and share things even if they’re not in the same place.”
Use fewer, better tools

Use a single piece of software rather than multiple tools to manage your projects. Multiple tools risk creating more work for everyone. Having one (or just a few) means there’s less for you and your team to manage, which streamlines processes and helps you all get more things done.

“Find a project collaboration tool that is easy to use. People won’t use solutions that are too complicated or fiddly. And if your team doesn’t use the tool you have in place, you won’t get the results you’re after.”

Mia Nordborg
Move away from email

Email is completely static, easy to ignore and doesn’t offer transparency. Hitting “Reply All” isn’t very collaborative, and information or documents can be held hostage in one person’s inbox where others can’t access them.

“We’ve plateaued with e-mail. It’s enabled a certain level of productivity, but it won’t get us any further. Stop using email as your primary means of communication on a project! Use an online solution to manage communication around your project.”

Jason Morio
It goes without saying that great execution needs proper tools and proven methods. Best of breed project management software provides a link between best practices, methods and management capabilities. Here are a few project management essentials.

Mia Nordborg

“One of the great advantages of using software tools is visualization. It’s so much easier to meet objectives when you can see them in front of you. Dashboards, Kanban boards and Gantt charts can make your plan and its related tasks easier to understand. This is true of all projects, but especially for complex undertakings such as organizational restructuring or large IT projects where the outputs might seem less tangible.”
Kanban boards provide a tangible way to visualize your tasks as “cards”. Arrange them in columns depending on what’s in progress, finished or yet to be started. These boards are great for teams and project managers to see daily task lists and carry out other short-term or medium-term tactical planning.

Gantt charts are more of a hypothesis – they present the goal that you want to achieve and visualize how you’re going to get from A to B. It’s a more strategic tool. You can use it to get buy-in for the plan from stakeholders and team members alike.
Workload management tools can be a valuable source to increase efficiencies by providing insight into information that is not accessible through traditional data reporting. They provide feedback on each member’s commitments and can indicate bottlenecks and unplanned-for activities.

“Whether you use Gantt charts, Kanban boards or something else entirely, a visualization tool should be simple, tangible and precise. You should also use a project management tool that can bring these visualizations together in one place for everyone in the team to access. It can help you monitor when people have too many tasks or whether something can be reassigned to someone else to ease the load.”

Karolina Jackson-Ward
Reporting on progress

Teams create vast amounts of data by planning and executing on tasks. This data can be used to inform progress, make decisions and set benchmarks for future performance. With the right tools, you can easily generate valuable customizable reports that can help you and your stakeholders track progress, find bottlenecks, and identify at-risk projects.

Be sure to utilize the dashboard functionality that is a key feature in most tools.

**Dashboards** provide project managers with a quick, easily accessible glance at how the project is progressing in relation to the plan.
Want to learn more?

You can get even more tips from Projectplace Customer Experience Manager Karolina Jackson-Ward by watching our “Getting Things Done” Webinar – available for free on the Projectplace website.

Also, check out part Two of the series – “Project Manager’s Guide to Getting Things Done: How to empower your team, manage workloads and keep stakeholders informed”.

Watch the Webinar now

Download the second eBook