



Project Management Cheat Sheet

I find that managing projects doesn't have to be difficult, but it does require time, discipline and good tools.

This "cheat sheet" provides you with some basics on how to manage a project. It is a bit oversimplified to not scare away project management novices. But, is also a useful reminder for seasoned project managers.

Where to Focus

The main things to focus on when managing a project are:

- | | |
|-----------------------|---|
| Scope | Stick to it and only make changes that are reviewed and approved. |
| Schedule | Manage to a work plan with tasks, timelines and dependencies; know the critical path. |
| Budget | Set up ways to measure progress against budget so you don't go over. |
| Relationships | Work to develop and maintain good relationships with team members and stakeholders. |
| Communications | Do lots of it! Use varied approaches because people process information differently. |

Getting off track on any of these puts your project at risk of failure.

Project Phases

1. Initiate

This is the starting phase of a project where you need to:

- Research and define the problem/opportunity and desired outcomes.
- Identify the project sponsor, project manager and key stakeholders.
- Justify the project through development of a rationale and business case.
- Draft a preliminary project summary describing the desired objectives, scope, approach, resource requirements and schedule. I like a project summary that acts as both project charter and scope.
- Prioritize against other projects.
- Obtain approval to proceed.

2. Plan

In this phase, you refine the project summary and plan and organize how the project is going to run.

- Dig deeper into the project objectives and scope and update the project summary. Add information related to requirements, dependencies, risks and assumptions.
- Involve the project team and stakeholders to get buy-in and complete information.
- Develop a project plan that shows activities, timelines, accountabilities and resource use.
- Identify how you are going to measure progress during execution of the project plan.

3. Execute/Control

This is where you work towards meeting the project requirements by doing the work in the project plan, monitoring performance and controlling activities and changes.

- Carry out the activities of the project plan
- Have regular meetings of the project team to make sure things are moving according to plan.
- Measure performance against the planned scope, budget and schedule to anticipate problems and make corrections as needed.
- Track and manage issues and risks, and make corrections as needed.
- Do lots of communication about how things are going and where you need assistance.
- Have a change process so only approved changes are implemented.

4. Close

Most projects skip this step, but it is important – regardless of whether the project succeeds or fails.

- Review how the project went to capture learning's for next time.
- Officially and publicly close the project (don't make people wonder if it is done).
- Celebrate your success!

Project Tools

There are lots of tools that can be used in the course of a project. The more complex the project, the more sophisticated the tools may need to be. Some basic tools I use on all projects include:

Project Summary	A combined project charter and scope document that includes: problem definition, project objectives, scope, requirements, high level timeline, resource needs, budget, risks and assumptions.
Work Plan	Captures project activities, dependencies, accountabilities, duration.
Responsibilities Matrix	A list of who is participating in the project and their role.
Issues/Risk Log	A log of issues and risks as they are identified and worked.
Status Report	There may be different reports depending on the audience, but there needs to be regular communications about what is going on.
Closure Review Form	Document what was learned when the project is closed.

Go for it!!

Have fun with your project and let me know how it goes!!

Paul Goldberg is a Project Management Professional (PMP) certified through Project Management International (PMI). He offers project consulting as well as project management training and coaching.

Learn more about Paul Goldberg & Associates, LLC at www.pgoldbergconsulting.com.