getsmarter

THE PROJECT MANAGERS

PLAYBOOK

The word "playbook", according to Google, refers to "a book containing a sports team's strategies and plays". Imagine your organisation as a sports team: without you, the Project Manager, coordinating the execution of broader business strategy and making sure everybody's making the right plays, winning is nothing more than a pipe dream. This interactive Playbook is designed to be your go-to guide on how to up your game as a project management professional; understanding the project lifecycle to take a successful project from concept to closure; effective project leadership practices; and how to craft the ultimate project plan.

STRONG FOUNDATIONS ARE BUILT ON THE BASICS

Any work that involves others can be understood and arranged as a project. Whether or not they are aware of it, all organisations require project management to one degree or another. Therefore, if you're able to position yourself as a capable project leader - you're equipped with a highly transferable, in-demand skill set that'll set you in good stead for a dynamic, lucrative career path for many years to come.

THE 7 PRACTICES OF HIGHLY PRODUCTIVE PROJECT MANAGERS

1. COLLECT ALL THE DETAILS

It's important that you understand the objectives of the project and define a detailed project scope. The scope reflects the boundary of the project and will assist you in grasping how much work the project is going to require.

ACTION: Determine the short-term milestones, the total timeline of the project and the budget that is needed. Get everything approved by the stakeholders and voila - you have yourself a solid foundation to begin with.

2. SET EXPECTATIONS AND DELIVERABLES

"You can have two of the three: good, fast, or cheap. You cannot have all three," so the saying goes. A project will fail if expectations are not reasonable and tangible deliverables aren't defined in detail.

ACTION: Ensure both your team and/or your client have a clear understanding of the project limitations so that you won't be required to work any project "miracles" and can deliver on time and within budget.

3. LAY OUT A METICULOUS PROJECT PLAN

Planning your project includes a number of aspects - more detail around that will be covered in Chapter 3.

ACTION:

- Select the team, identify the resources needed and determine the budget
- Breakdown the work structure in order to produce the deliverables of the project
- Plan timelines for each project activity and lay them out on a realistic schedule
- Set small milestones so the team is aware of critical dates
- Once this project plan has been written out, ensure all stakeholders read it and sign off on it

4. KEEP YOUR TEAM IN THE LOOP

Want to be a project manager that nails it every time? Recognise that you're only as effective as the people you surround yourself with.

ACTION: Assign a project team that is well-suited to the task and communicate the project plan to each of them in detail. Encourage that communication to continue throughout the project so they always feel they can come to you with queries or concerns.

5. ESTABLISH MEASURABLE AND REPORTABLE CRITERIA

The reality? Projects change shape and size all the time. But if you manage to keep track of the cost, scope and schedule of the project, you'll be able to adjust accordingly as soon as you're made aware of any changes.

ACTION: Collect progress reports from each team member and compare the actual progress with the planned progress.

6. REMEMBER: YOU'RE THE LEADER

You're the coach, mentor and motivator. Use this role to draw out the best in your team and inspire them to work hard.

ACTION: Use team-building activities to cultivate an atmosphere that's productive and unified. Be calm and strong if your project hits a few bumps because it's in the challenging times when your team will need a leader.

7. TAKE NOTES

It's important to sit down with your team after the project is completed and do a recap.

ACTION: Document what worked well, what went right, and what went wrong. Write down the practices that could have been performed better and ask for honest feedback from the team.

BONUS CONTENT

To be a high-performing project manager, you need a team that's confident in your decisions and your leadership. Watch this video to find out if you're fit to lead a team to success.

UNDERSTANDING THE PROJECT LIFECYCLE

When approaching your next big project, use this interactive roadmap to ensure you're moving swiftly through the five most important phases of the project management lifecycle in order to steer your project smoothly from concept to closure.

PHASE 1: PROJECT INITIATION
GOAL OF THIS PHASE: DEFINE THE PROJECT BROADLY.

DEFINE PROJECT:

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(Give a brief outline of what the project is about)

Do feasibility testing

Get the go ahead from stakeholders

If stakeholders give the go ahead you will need to develop a project initiation document (PID) which gives a brief of the project's purpose and requirements; and includes the business needs, stakeholders and business case.

Create project initiation doc
Choose project manager
Project manager to select team
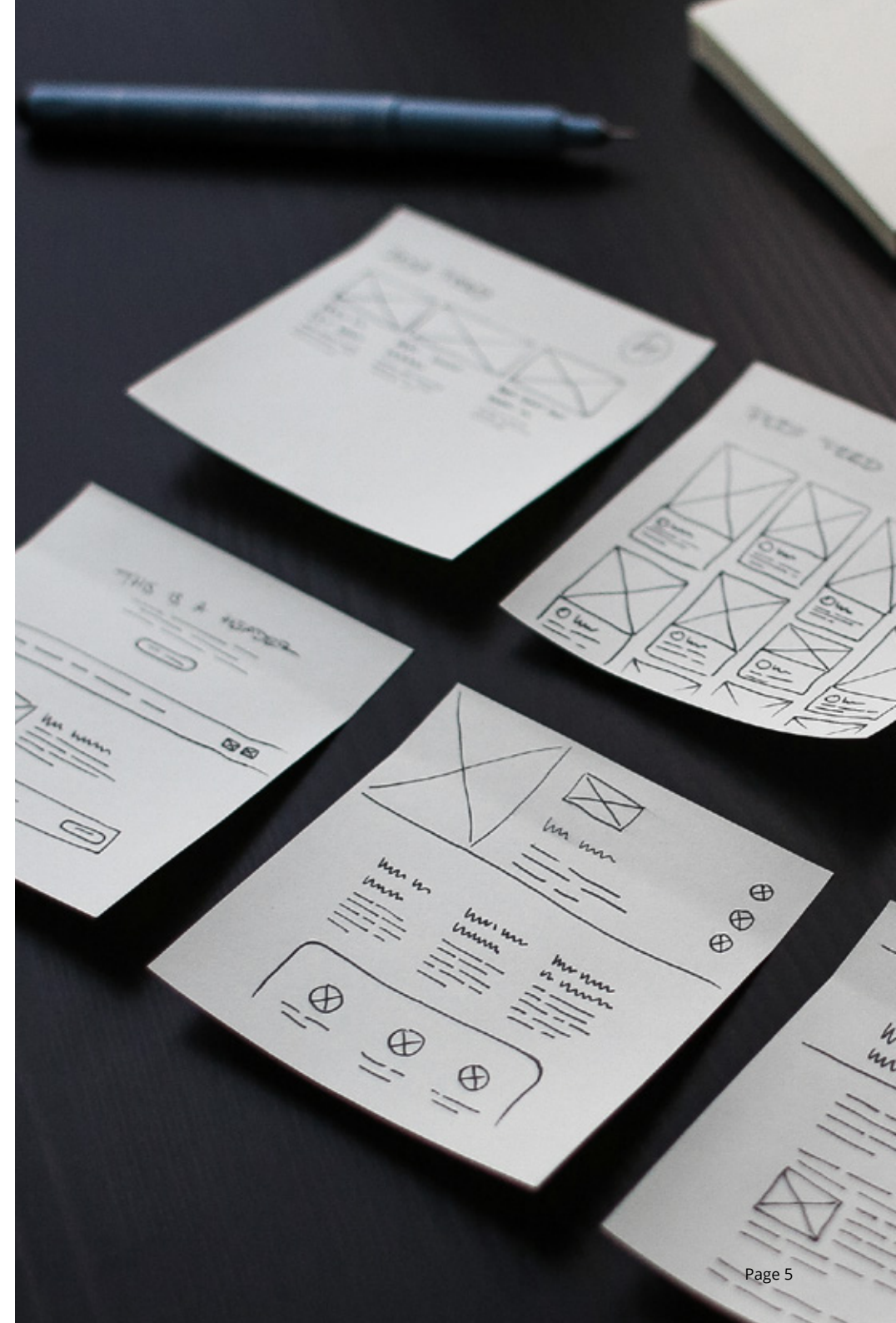
PHASE 2: PROJECT PLANNING
DEVELOP A PROJECT ROADMAP FOR EVERYONE.

Set smart goals

S.M.A.R.T GOALS ARE:

Specific – To set specific goals, answer the following questions: who, what, where, when, which, and why.

Measurable: Create criteria that you can use to measure the success of a goal.

Attainable: Identify the most important goals and what it will take to achieve them.

Realistic: You should be willing and able to work toward a particular goal.

Timely: Create a timeframe to achieve the goal.

Example: By June 30, 2015, identify 3 metrics that will define success for our employee advocacy program.

DO A DOUBLE CHECK. ARE YOUR GOALS:

Specific?   Measurable?   Attainable?   Realistic?   Timely?

DEVELOP PROJECT PLAN

Identify:

Cost   Quality   Available resources   Timetable

The project plan also includes establishing baselines or performance measures. These are generated using the scope, schedule and cost of a project. A baseline is essential to determine if a project is on track.

ESTABLISH BASELINE

Baselines or performance measures are determined using the scope, schedule and cost of the project.

DEFINE ROLES AND RESPONSIBILITIES FOR EVERYONE INVOLVED

OTHER DOCUMENTS TO CREATE

Scope Statement

Define the business needs, benefits of the project, objectives, deliverables, and key milestones.

Work Breakdown Schedule

Create a visual portrayal of the project that breaks the scope down into feasible divisions for the team.

Milestones

Identify high-level goals that need to be achieved throughout the project. Incorporate these into the Gantt Chart.

Gantt Chart

Develop a visual timeline to plan out your tasks and give you a holistic view of the project.

Communication Plan

Especially important if external stakeholders are involved in your project. Requires appropriate messaging around the project and a schedule documenting when to communicate with the team regarding milestones and deliverables.

Risk Management Plan

Identify any possible risks such as unrealistic time and cost estimates or budget cuts.

PHASE 3: PROJECT EXECUTION
GOAL OF THIS PHASE: DEVELOP AND COMPLETE DELIVERABLES.

Hold kick-off meeting
Inform team of their responsibilities

Assign resources
Execute project management plans
Procurement management if needed
Set up tracking systems
Team to execute on task assignments
Check in with team to assess project status
Update project schedule
Modify project plans if needed

PHASE 4: PROJECT PERFORMANCE/MONITORING
GOAL OF THIS PHASE: MEASURE PROJECT PROGRESSION AND PERFORMANCE. OFTEN OCCURS SIMULTANEOUSLY TO THE PROJECT EXECUTION PHASE.

SELECT PROJECT KPI'S (KEY PERFORMANCE INDICATORS)

1.
2.
3.
4.
5.

MEASURE PROJECT OBJECTIVES:

Measuring if a project is on schedule and budget is an indication if the project will meet stakeholder objectives.

On schedule   On budget

ARE SPECIFIC TASK DELIVERABLES BEING MET?

Deliverable 1

Deliverable 2

Deliverable 3

Deliverable 4

Deliverable 5

Deliverable 6

WILL PROJECT MEET COMPLETION DATE BASED ON CURRENT

PERFORMANCE? Y   /N

PROJECT PERFORMANCE NUMBER OF ISSUES ENCOUNTERED:

These can occur from unforeseen hurdles and scope changes.

LIST ISSUES:

1.

2.

3.

4.

5.

TIMEFRAME IN WHICH ISSUES WERE ADDRESSED:

TIP Review the business case at the end of each phase
and make necessary changes

PHASE 5: PROJECT CLOSURE
GOAL OF THIS PHASE: REPRESENT THE FINISHED PROJECT

Show recognition towards team members

Terminate contractors

Hold evaluation meeting

Identify what worked

Identify what didn't work

Once the project is complete, you'll need to create a "punchlist" of things that didn't get accomplished during the project and ensure they do get completed.

Create project punchlist

Perform final project budget

Prepare final project report

Store all project documents and deliverables in a single place

COORDINATING TALENT TOWARDS A COMMON GOAL

Though often overlooked or undermined, the soft skills unique to this profession are also of paramount importance to securing sustainable success as a Project Manager. Take one of the world's first widely lauded Project Managers, for example: recognised by Winston Churchill as "the organiser of victory" for his leadership during WWII, American military leader, George Marshall, was famous for an uncanny ability to select the perfect person for a particular job, every time. Effective talent management, and the many soft skills that accompany it (communication, leadership, strategic vision, etc.), is a fine art that can only be mastered with the right combination of theoretical education and hands-on experience under expert mentorship.

6 SURE-FIRE TACTICS TO MOTIVATE YOUR TEAM TO PRODUCE GREAT WORK

When you have a highly motivated team, you also have a highly productive team. Successful project managers in 2016 will be the ones that motivate their team through the power of engagement, bringing South Africa's new network of ambitious, hybrid marketers up to speed with the international standard of this booming industry.

QUICK CHECKLIST:

How motivated are your team members?

The highly motivated employee:
- Puts forward their best effort at all times
- Is always trying to improve performance on the job
- Directs their efforts towards accomplishing meaningful goals

1. THE POWER OF INDIVIDUAL TEAM MEMBER GOALS

If you're only setting team goals, you're missing a huge opportunity. Because when you set goals that are tailored to an individual, you tap into their aspirations and need to self-actualise. Meaningful goals transform their aspirations into tangible and reachable objects, and motivate them to commit and act with intent.

BONUS CONTENT:

To learn more about how management has evolved to the progressive place it finds itself in today, **_check out this infographic_**

2. SHARE YOUR PERSONAL PRODUCTIVITY TIPS

Just because you think like a project manager, doesn't mean your team does. Motivate them to meet project goals by giving them a crash course in PM basics. They can apply these basics to their own personal workflow, and get more done, faster.

TIP Badly planned goals, or those that are too vague, will have the same effect on motivation as if you had none. Check back to Chapter 1 and be sure to use specific, measurable, achievable, results-focused, and time-bound (SMART) goals to ensure you avoid this.

3. THE POWER OF INDIVIDUAL TEAM MEMBER GOALS

A PDP will help your team develop new skills and competencies - which in turn will empower them with a sense of accomplishment and achievement. The more your team achieves, the more motivated they'll be to achieve more.

TIP Teach your team how to break down tasks with a Work Breakdown Structure. This is an invaluable tool all PM and non-PM professionals should learn.
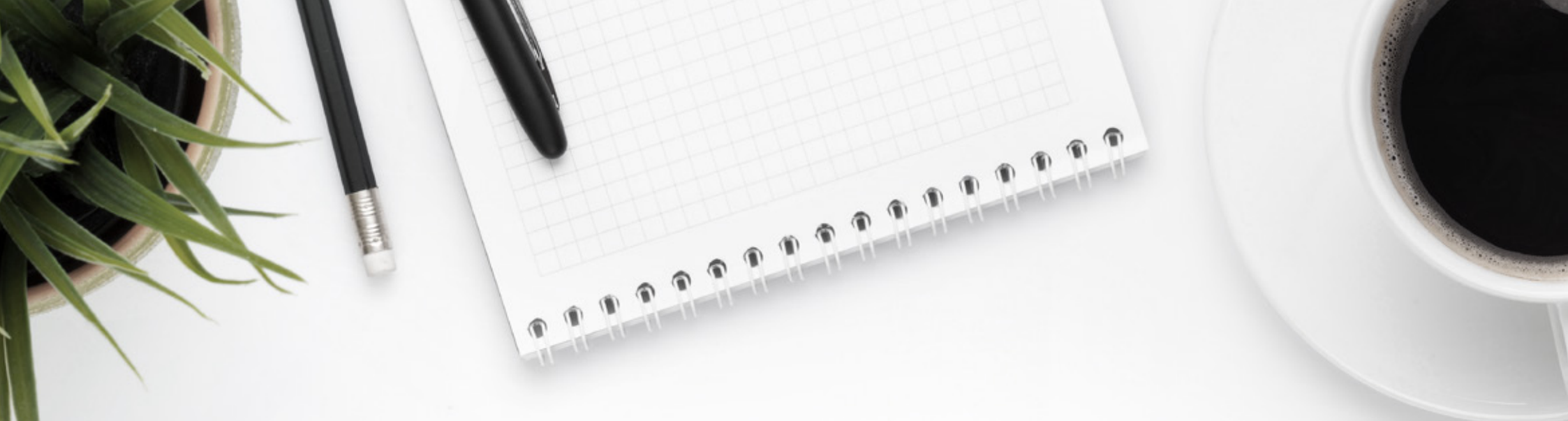
4. GIVE YOUR TEAM PERMISSION TO "FAIL AND LEARN"

The more autonomy you give to your team, the more they'll thrive. People want to make their own decisions and feel like they're in control. This will motivate them to push even harder as they'll be committed to making their ideas work. As Michael Jordan said: *"I've failed over and over and over again in my life and that is why I succeed."*

TIP

To provide autonomy, use agreed upon outcome-based objectives, without being too prescriptive about how outcomes will be achieved.

5. CELEBRATE THE VICTORIES - NO MATTER HOW SMALL

Give your team the recognition they deserve for each goal achieved. Even if it's only a small efficiency gain in a process, team members who know their contributions are being acknowledged and rewarded will be more motivated to contribute further to the project.

TIP

Both tangible and intangible rewards can be just as effective:
Tangible: A gift certificate, a bonus, a novel office gadget
Intangible: Take the team out for lunch, give a team member extra time off

5. TURN TEAM MEETINGS INTO PROBLEM-SOLVING SESSIONS

Get your team involved in solving the collective issues, problems or challenges that face a project at the time. This will encourage greater engagement, members who know their contributions, and are being acknowledged.

TIP

Engagement tactics:
• Ask, "What can I do to improve my management style?"
• Let collaboration thrive - create a "no-idea's-a-bad-idea" environment
• Ensure your team takes frequent breaks
• Organise enjoyable team-building activities

DAILY STRATEGIES FOR BEING MORE THAN A MANAGER

Lead first, manage second. That's the trending advice being handed out to ambitious project managers around the world today. But, what does it mean exactly? How do PM's elevate their leadership game over and above what's already expected of them? The answer is to start focusing on leadership strategies that empower your team to be better, without you having to manage them. Here are just 2 examples:

PLAY 1:
DELEGATE

Situation: You're swamped with work, which is preventing you from leading to the best of your ability.

The play: You create an atmosphere of enablement by delegating work to the team. This has 2 important perks:
- You get to focus on the higher level PM activities
- Your team is empowered to make significant contributions

How to delegate effectively:
- Be clear about overall purpose of the task and outcomes
- Ask (don't dictate) for an estimate of when tasks will be completed
- Agree on what level of autonomy is required

Why this play makes you more than a manager?
It moves you closer to a team that's able to self manage, and grows your role as a facilitator rather than a manager.

PLAY 2:
ASK THE RIGHT QUESTIONS

Situation: Your team is struggling to solve a problem.

The play: You frame the problem around appropriate questions to help your team discover the right answers on their own terms, rather than being told. This has 2 perks:

• You learn how to ask the right questions, which is important for your own personal growth as a leader

• It fosters ownership, autonomy, and feelings of success in your team

Suggestions for asking the right questions:

• Think of the biggest concern. Ask "why". Then repeat asking "why" four more times.

• What is everybody thinking, but nobody has the courage to say?

• What if we did the opposite?

Why this play makes you more than a manager?

By giving your team the chance to figure out the problem on their own, you've gifted them with a memorable experience that will empower them to tackle problems in the future.

By using empowering leadership strategies such as these, you end up creating leaders rather than followers - which is exactly what you need in the current project management industry.

WORRIED YOU'RE TOO SET IN YOUR OLD MANAGEMENT WAYS?

Keep this checklist close at hand to remind you what separates managers and leaders. Every day, try to incorporate a leader's approach into your daily routine. It will only be a matter of time before you're more than a manager.

MANAGERS	LEADERS
1 Administer	1 Innovate
2 Ask how and when	2 Ask what and why
3 Focus on systems	3 Focus on people
4 Maintain	4 Develop
5 Rely on control	5 Inspire trust
6 Have short-term perspective	6 Have long-term perspective
7 Accept the status quo	7 Challenge the status quo
8 Keep an eye on the bottom line	8 Keep an eye on the horizon
9 Imitate	9 Originate

BONUS CONTENT Evidence-based management (EBM) is a relatively new movement where managerial decisions are informed by only the most current and best evidence available in management and decision making. Check out this infographic to learn more.

HOW TO HIT THE GROUND RUNNING

As we've so far discovered, project management encompasses a number of skills: the ability to motivate a team to work cohesively towards a singular goal, gather information and resources, identify and solve problems, predict outcomes, create deadlines for deliverables, set goals, implement decisions, and execute tasks. This final chapter aims to consolidate what's come before with a practical guide to attacking the all-important project plan.

3 STEPS TO FOLLOW BEFORE YOU CAN GET GOING ON YOUR PROJECT PLAN

1. CREATE A BUSINESS CASE

This is a detailed document that compares the costs, benefits and risks of alternative approaches that could address the business need, and provides a business justification for why a certain project is best suited to this task.

CHECKLIST:
Ask yourself, is your case:

Consistent
Are the same basic issues addressed in all proposals?

Measurable
Are all factors, such as estimated cost or the number of resources, based on measurable information?

Accountable
Is an executive assigned as the responsible party for ensuring that short and long-term benefits are achieved?

Suitable
Is the case written to suit the size and scope of the project?

Focused
Is the case focused on the impact the proposed solutions will have on the business, rather than on the technicalities?

Comprehensive
Does the case cover everything and is it written in a way that avoids overly technical language?

Honest
Is the case transparent, and can the elements and assertions made be justified?

DOES YOUR CASE INCLUDE:
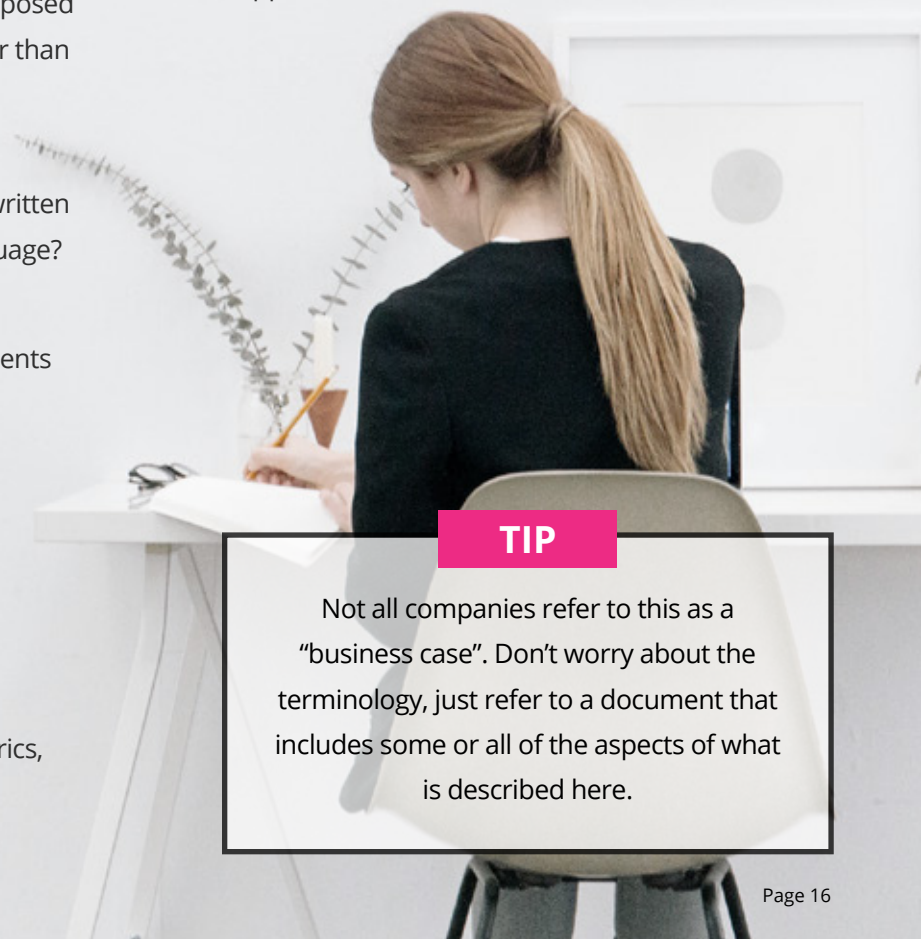Cover page
Table of contents
Executive briefing
(Recommendations and alternatives)
Introduction
(Business drivers, scope, financial metrics, time considerations)

Analysis
(assumptions, cost benefit analysis, costs, benefits, risk, strategic alignment)
Conclusion, recommendations and next steps
Appendix

TIP

Not all companies refer to this as a "business case". Don't worry about the terminology, just refer to a document that includes some or all of the aspects of what is described here.

2. CREATE A PROJECT CHARTER TEMPLATE

The project charter is a formal document in which the project's existence and the project manager's authority is recognised. It defines the scope of the project as well as its official start date, and serves as a formal record of the project.

IT IS INFLUENCED BY:

• Business case
• Enterprise environmental factors

These are conditions that the project team cannot control but that still affect the project, such as marketplace conditions, organisational culture, standards and structure, government standards and regulations, and industry standards
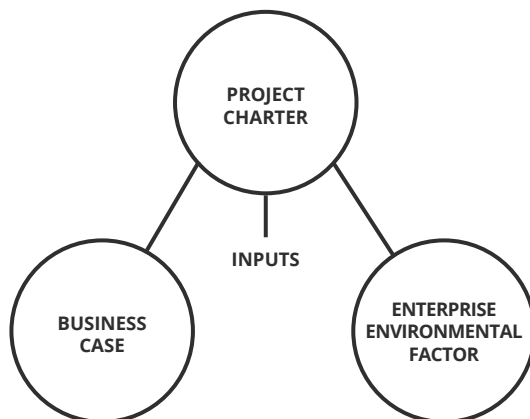
The project charter includes everything from key project stakeholders, business problems or opportunities, and key performance indicators, to the principles of the "Iron Triangle": scope,timeframe and cost. Take a sneak peek into the UCT online Advanced Diploma in Business Project Management **with this video discussing the Iron Triangle.**

The project charter is crucial in getting buy-in from the relevant stakeholders for the proposed project and so should be developed jointly. Similarly, the project objectives also need to be clearly defined and agreed upon, as this will align the stakeholders, start the process of scoping the project and ultimately make assessing the success of the project easier.

PROJECT CHARTER

INPUTS

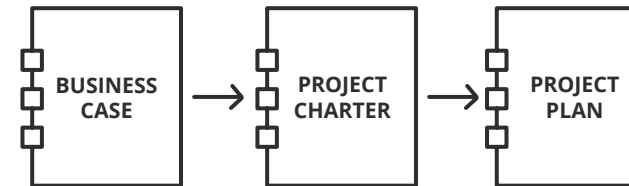**BUSINESS CASE**

ENTERPRISE ENVIRONMENTAL FACTOR

TIP

Wondering why a career in project management could be the smartest step you take in your career path? Take a look at this article.
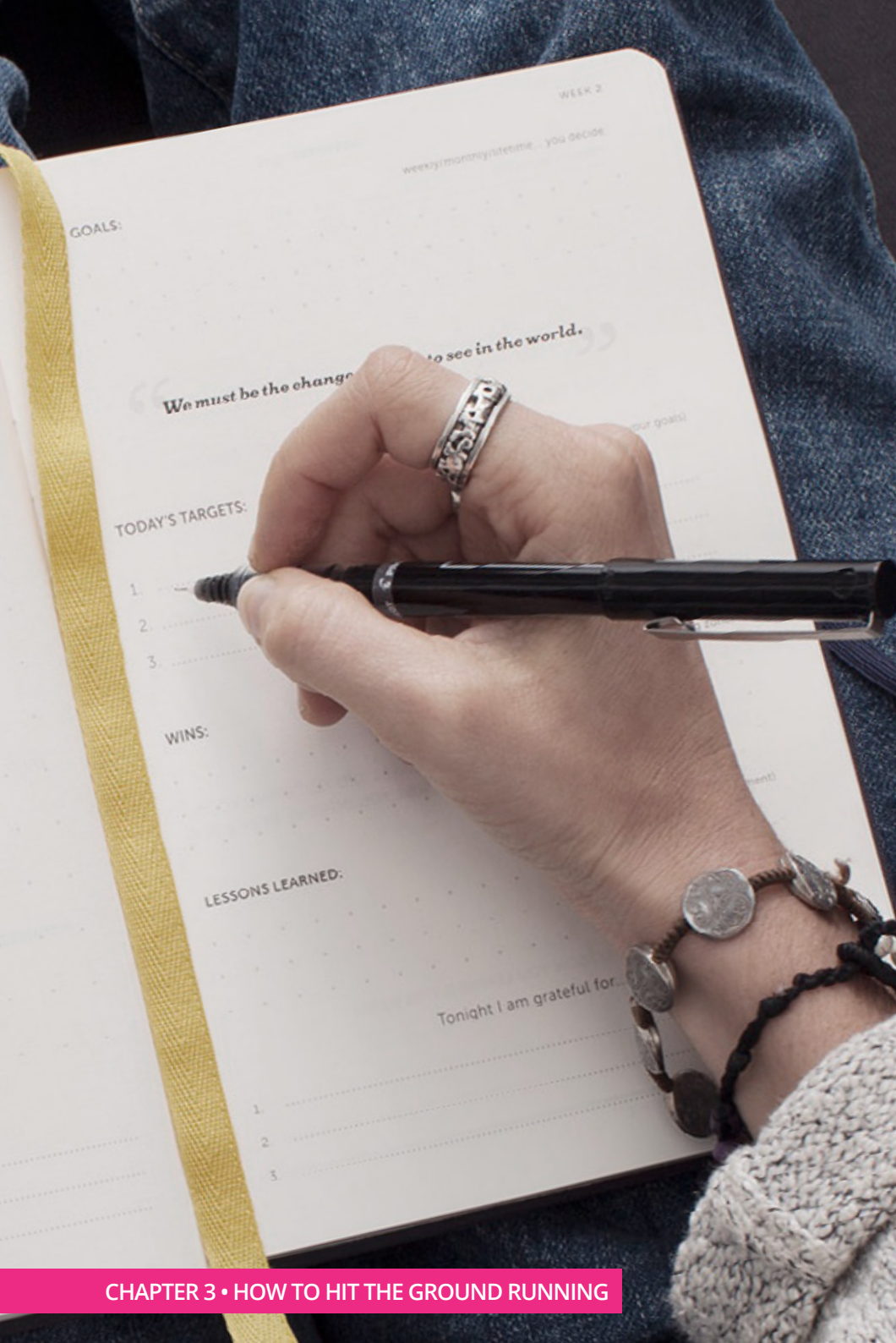
3. CREATE A PROJECT PLAN TEMPLATE

The intention of the project plan document is to produce a detailed definition of how you will manage the various project management processes and knowledge areas.

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┌──────────┐     ┌──────────┐     ┌──────────┐
│ BUSINESS │ ──▶ │ PROJECT  │ ──▶ │ PROJECT  │
│  CASE    │     │ CHARTER  │     │  PLAN    │
└──────────┘     └──────────┘     └──────────┘
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THE PROJECT PLAN SHOULD COVER 2 KEY AREAS:

1 The "What"

This includes a detailed definition of the knowledge areas, including scope, schedule, budget, risk, and priorities

2 The "How"

Your strategy for managing the knowledge areas, including progress management, risks and issues, resource management, and implementation

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TIP

Why use templates?

Milosevic and Ozbay (2001) states that: *"The winners clearly spell out what needs to be done in a project, by whom, when, and how… If a scheduling template is developed and used over and over, it becomes a repeatable action that leads to higher productivity and lower uncertainty."*

YOUR FREE INTERACTIVE PROJECT PLAN TEMPLATE

Project plan templates, like projects themselves, differ according to a variety of factors, and should be customised according to what is most suitable for each project. Use this interactive and highly customisable template to suit your project needs.

CLICK HERE TO DOWNLOAD YOUR FREE TEMPLATE

READY TO BE A PROJECT LEADER IN YOUR INDUSTRY?

If you're interested in launching or advancing your career in this industry, formalising your project management skills with a recognised qualification is the route to go. The value of hands-on project management experience is exponentially increased when coupled with an official certification from a respected tertiary institution.

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ADVANCED PROJECT MANAGMENT
ONLINE SHORT COURSE

12 Weeks online

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