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# FOREWORD

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*In today's digital world, work is planned and executed through mission-based teams. As a result, project and program management skills are more necessary and more in demand than ever before. Project Managers are responsible for managing people and projects, incorporating emerging technologies — all for successful project execution.*

*Anyone who has ever worked on a project will agree that making a project succeed is no simple task. The difficulties manifest themselves in delays, budget over-runs, inadequate results, dissatisfied students / professors, high stress among the project team and other undesirable outcomes. What is the cause of all of these problems?*

*Projects are characterised by four features: a group of people, a goal, limited time and money and a certain level of uncertainty regarding whether the goals will be achieved. Project managers are involved with all of these aspects. Supervising and directing a project is thus anything but an easy task.*

*In the last 50 years, project management has evolved from an coordination role to the management of complex pieces, from system conception to design, integration, delivery, and long-term support. Along the way, methodologies, processes, and tools have been developed which, with the help of computer technology, have enabled improved planning, tracking, and control.*

*This guide is meant to be a primer on project management for beginners. It is written from the perspective of someone with no prior project management experience. Although the target audience are students, the takeaways from this guide are applicable in any business.*

*In this beginner-friendly project management guide, we'll show you how you can use project management in your own business. You'll learn about the various phases in a project management lifecycle. You'll also learn about its many processes and activities.*

*This guide is organized into multiple sections. The first section gives a brief overview of project management. The sections that follow deal with different stages of the project management lifecycle.*

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# What is Project Management?

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Before we can define project management, let's first define a 'project'.

The Project Management Institute (PMI), U.S.-based not-for-profit professional organization for project management, defines a project as "a temporary endeavor undertaken to create a unique product, service or result."



A **project** is a temporary endeavor undertaken to create a unique product, service or result

Projects can be of any scale or complexity. Developing a website is a project, as is constructing a new city from scratch.

**Project management**, therefore, is the process of managing a project.

The person responsible for planning and managing a project is called a **project manager**. Large projects might have multiple project managers, often reporting to a program manager.

A **program** is a group of related projects.

The two most important elements in any project are its **stakeholders** and **resources**.

- **Stakeholders** are all individuals or organizations that are involved in or stand to benefit from the project. Clients, senior leaders in your business, and even people who might use the project are all 'stakeholders'.
- **Resources** are human or tangible resources you need to complete a project.

In a way, project management essentially means managing resources effectively to deliver on the expectations of stakeholders. Understand this core concept and you'll understand project management.

## What Does a Project Manager Do?

Earlier, it was mentioned that a project manager is the person responsible for managing a project.

But what does *managing a project* actually entail?

Broadly speaking, it means combining strategy and operations. You *plan* a project's progress, working with stakeholders to meet their strategic goals. Then you *execute* on the plan, managing resources to deliver results.

## Project Manager Roles and Responsibilities

A project manager has to fulfill a number of roles and responsibilities while managing a project. Some of these are:

- Defining the scope of a project
- Planning and sequencing activities
- Planning and managing resources
- Developing schedules
- Estimating time and costs
- Developing and managing budgets
- Analyzing and managing risk
- Team building and team leadership

A good project manager is a change agent who thrives when working in dynamic environments. He has excellent communication and people skills, and an innate ability to break down and delegate work effectively. Project managers can see the big picture yet focus on the small details that make a project successful.

## Why Use Project Management?

If you're new to project management or have never used it formally in your organization, you might wonder what the fuss is all about.

First, understand that every organization uses project management, even if they don't know it.

If you use a spreadsheet to keep track of your work, you're effectively using "project management".

If you have a notebook with a list of employees and their responsibilities for the day, you're practicing PM as well.

Most organizations use a combination of formal and informal project management processes. Some stick to strict PM methodologies. Others improvise ad-hoc processes as necessary.

When adopted formally by an organization, project management has the ability to bring much-needed efficiency and scalability to projects. PM processes have been refined over years of theory and practice to help teams deal with complex requirements in dynamic settings.

## Project Management Phases

Project management is a complex, multi-step undertaking. You have to gather data and insight from stakeholders, develop a plan, delegate work, manage resources and deliver results.

The project management lifecycle can be divided into five distinct phases:



- **Initiation:** In this first phase, you'll develop a project overview, map out your project management approach, and pick a project manager. The latter, in turn, will select a team and start the planning process. You'll create a project charter at this stage.
- **Planning:** In the second phase, you (the project manager) will develop a roadmap for the project team. You'll set goals, define the scope, create a work breakdown schedule (WBS), identify milestones, and develop communication and risk management plans.
- **Execution:** The meat and potatoes of project management - this phase involves developing a team and assigning tasks, holding meetings, and setting up tracking systems. Much of the actual work of the project happens in this phase.
- **Monitoring:** This phase happens alongside the Execution phase and involves monitoring the team performance and managing its output quality. You'll track

deliverables, project costs, and the performance of individual team members and the project as a whole.

- **Closure:** In the fifth phase, deliverables are handed over to stakeholders and the project is brought to a formal close. You'll review your team's performance and recognize their effort. You'll also analyze the project for flaws and take notes to improve future performance.

## 1 Project Initiation

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The first step in managing any project is project initiation. In this critical step, the need and objectives of the project are identified, deliverables are defined, and the initial team is appointed.

Getting this part right is essential for project success. Not defining clear goals or picking the wrong solution has a lasting impact on how the project pans out.

Once you're done with this phase, you would have a concrete **project charter**. This document gives the project manager the authority to access resources required to complete the project.

There are five key steps in the project initiation phase.

### The Five Steps in Project Initiation



Your goal in the project initiation phase is two-fold - a) develop a business case for the project, and b) build the core project team.

This involves five steps:

### 1. Develop a Business Case

When you first initiate a project, you have to first define the 'why' of the project - why does it need to exist? Why do you need the project right *now*?

You'll usually present the business case to the project sponsor. The sponsor, in turn, will give the green light for the project and allocate resources for it.

Once the business case is approved, you can undertake a feasibility study.

### 2. Undertake a Feasibility Study

The feasibility study is the process of documenting potential solutions to the problems and opportunities outlined in the business case. Your goal is to document which of the solutions are feasible, which are not.

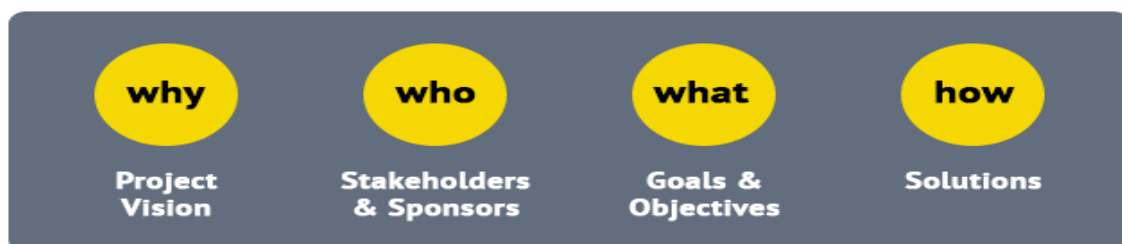
The next step after undertaking this study is to develop a project charter.

### 3. Develop a Project Charter

The project charter is one of the most important documents in any project. It is also one of the key deliverables at the end of the initiation phase.

The project charter is essentially a summation of the previous two steps (business case and feasibility study). It defines the vision, scope, deliverables, and deadlines for the project.

You'll answer the most important questions about the project in this charter - **why** it exists (project vision), **who** it impacts (stakeholders), **what** is its purpose (goals), and **how** it seeks to achieve them (solutions and requirements).





A strong project charter has a broad vision as well as specific objectives. Finding a balance between the two is important for getting the most out of the project.

From here on, you can start building the project team.

#### **4. Build the Project Team**

The next step after the project charter is to find the right people to deliver the project.

To do this, you first need to create a 'Job Description' for the project's key roles, such as the project manager. The job description should include the following:

- The purpose of the role
- The responsibilities associated with the role
- Who this person will report to
- Relevant experience and skills for the role
- Relevant qualifications
- Performance evaluation criteria
- Salary and working conditions

Think of this as the ad you would write for a job opening. In fact, you can use the same description when you're hiring people for each role.

Once you've defined each role, you can start searching for the right people for it, either from within or outside the business.

#### **5. Set up the Project Management Office (PMO)**

Although not always necessary, a dedicated project management office (PMO) can greatly impact the success of a project. The PMO defines the physical and the *virtual* space embodied by the project staff within a business.

Not every project needs a dedicated PMO, especially if the project is small and unscalable. However, if your organization intends to undertake a lot of projects, it helps to have a separate physical space for the project management staff.

Once you've set up the PMO, the project initiation phase officially comes to a close. You can now hand over the reins to the project manager who can go about planning and executing the project.

## ② Project Planning

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The planning phase is self-explanatory enough: this is where you lay out the project plan, develop schedules, estimate costs, and establish performance indicators.

Planning is necessary for developing the frameworks necessary for decision making as the project progresses from initiation to closure. The more complex the project, the more you'll benefit from meticulous upfront planning.

Developing the project plan is the project manager's responsibility. He/She will have to interface with stakeholders, project teams, and sponsors to create the plan. You'll want to consult records, analyze the organization's capabilities, and use best-practices based on your

The end result of this phase is the Project Management Plan (PMP). This is the single most important document in the life cycle of a project and defines how each of its activities must be undertaken.

### Creating a Project Management Plan

A project plan is essentially a summation of several activity plans covering everything from communication to risk management.



*This graphic shows the various planning activities that make up a project management plan*

Ideally, you should have separate plans for all these activities.

Let's cover the planning process for these activities in more detail below:

#### 1. Project Plan

The project plan is the first thing you'd create in the planning phase. This document identifies all the activities and tasks necessary to deliver the project's objectives. It also defines the resources, milestones, and timeframe for deliverables.

## **2. Communication Plan**

Communication, as we've stressed time and again, is one of the most important activities in any project. How you communicate with clients and more importantly, within your own organization has a huge impact on project success.

This plan describes your approach to communicating the right message to the right person at the right time and in the right format.

## **3. Resource Plan**

Determining what tasks require which resources, how to procure them, and how to manage them is a big part of any project manager's job responsibilities.

The project resource plan describes all of the above. It is based on the resource requirements mentioned in the original project charter, except it is much more detailed and specific.

## **4. Financial Plan**

The financial plan identifies all the expenses needed to meet the project's goals. This includes expenses on both human and non-human resources, tools, office space, etc. The sum total of all these expenses becomes the project's budget.

The financial plan is closely linked to the resource and risk plan (see below). The cost and quantity of each required resource will depend on the resource plan. You will also have to keep a separate budget for risks and contingencies based on the risk plan.

## **5. Risk Management Plan**

Every project has some inherent risks. A key resource quitting the team halfway. A sponsor not releasing additional funding in time. A communication error resulting in delayed delivery.

All these examples of potential risks a project manager has to contend with.

The risk management plan describes these potential risks and maps out a process to tackle them.

## **6. Change Management Plan**

As any seasoned manager will tell you, change is the only constant in project management. The scope and requirements of the project can change dramatically from initiation to final delivery.

To deal with these changes, you need a **change management plan**.

The change management plan describes the process for dealing with changes. It offers a concrete plan to list, evaluate, implement, and deliver any deviations from the original scope.

## ③ Project Execution

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The project execution phase is where all the action happens. This can either be the easiest part of project management or the hardest. It all depends on how much effort you've put into planning.

In the execution phase, you'll manage the project team, hold team meetings, and communicate the project status to stakeholders among a host of other duties. You'll use a number of communication and project management tools, and you'll be expected to utilize PM best practices.

All the activities associated with executing a project can be divided into several categories, each with its own skill requirements as shared below.

### Project Execution Activities

Think of everything you need to successfully manage a project. You need a way to keep track of tasks and time, communicate clearly, delegate effectively, hold meetings, etc.

Each of these activities is crucial for successful project delivery. Many are also interdependent. For example, if you can't delegate work effectively, strong task management won't help. If you can't communicate clearly, holding regular meetings will be futile.

To be effective at project execution, therefore, requires that you be effective at all its constituent activities.

And what are these constituent activities?

Some of the most important ones are listed below.

#### 1. Resource Management

As a project manager, one of your most important duties is to manage resources. While nominally this means managing all resources - human and non-human - in most projects, it boils down to managing the project team.

## 2. Time and Task Management

Managing tasks and time are two closely related project activities. The former focuses on assigning tasks to the team and managing them until completion. The latter focuses on managing how the team spends its time on various tasks.

Besides managing tasks, you also need to manage how your team spends its time.

You need to this for both team members and tasks, that is:

- Track the time taken to complete each task
- Track the time spent by each team member on different tasks

You'll use timesheets and time management logs to record this data. Most project management tools should have this capability built-in.

## 3. Manage Risks and Changes

Managing risks and change requests are two unrelated but somewhat similar activities. Both involve proactively monitoring the project for issues and accommodating changes, if necessary.

Similar to risk management, **change management** also requires a close understanding of the potential impact of any change request on the project.

## 4. Managing Communications

Communication is, without doubt, one of the most important activities in executing any project. You have to make sure that everyone on the team is on the same page, that stakeholders are well-informed, and that people have access to the right information at the right time.

As you might have noticed, project execution is mostly about putting the plans you created earlier into action. The better your plans, the stronger the execution.

While you're executing your plans, you also need to make sure that the project is meeting your quality standards and deadlines. This is the goal of the next phase - monitoring and control.

# Project Monitoring & Control

Project monitoring & control is only a nominally distinct phase in project management. In practice, it takes place alongside project execution.

Your goal in this phase is to make sure that the project meets your quality guidelines and deadlines without exceeding the budget.

This isn't about micromanagement; it's about tracking the project's progress and ensuring its compliance with the project plan. Think of yourself as a navigator with the project leader as the driver. Your job is to guide the project and make sure that it maintains course.

Project monitoring and control involves a number of activities as mentioned below.

## 1. Choose Your KPIs

As Peter Drucker once said, *"if you can measure it, you can improve it"*.

To track the progress of a project, you'll first need to settle on your target Key Performance Indicators (KPIs). Ideally, you should have between 2-5 KPIs to measure project performance along different variables.

Some KPIs you can use are:

- **On-time completion:** Track how many tasks are completed on-time, expressed as a percentage figure. This is a good indicator of the timeliness of the project.
- **Budget variance:** Track how much the actual budget varies from the planned budget (as a percentage value). Too much variance can tell you to rein in your spending.
- **Planned vs. actual hours of work:** Compare the difference between the hours of work as planned vs. the actual hours of work put in. If you're spending more time than planned, it might be wise to re-estimate the project schedule.
- **Schedule variance:** Compare the planned time and budget vs. actual time and budget spent on the project to date. The difference between these values is the schedule variance. A positive figure shows that you're on track and have additional budget left.
- **Missed milestones:** Track how many milestones you've missed and by how much. This will tell you whether you're on schedule or not. Missing too many milestones is an indicator of poor planning or execution.

A project management tool should be able to display all these KPIs on a single dashboard. You should also be able to create reports with these KPIs for sharing with clients.

## 2. Controlling and Monitoring Communications

How well your project team communicates - among themselves and with stakeholders - will have a big impact on project success.

Thus, a big part of the fourth phase is monitoring and controlling communications.

## 3. Engaging Stakeholders

Stakeholders are arguably the most important people in your project. After all, they're the reason the project exists in the first place.

Much of project monitoring and control focuses on tracking KPIs. There is a subjective portion to this as well in the form of the quality of the output (which can be highly subjective for creative work) and the general "vibe" around the project team.

Once you've monitored the project to completion, you can switch over to the fifth and final phase - project closure.

# 5 Project Closure

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Once you've met all the milestones and handed over all deliverables, it's time to close the project.

Project closure is where you learn from the project, recognize exceptional performance, and perform a final clean up of anything left behind. Project managers who thrive on learning understandably stretch this post-mortem phase to gather as much data as possible.

The first thing you must do post delivery is *scope verification*.

**Scope verification** is where you get together with the stakeholders and make sure that all the promises in the project scope are included in the final deliverable. If there must be any revisions or corrective actions, get to it immediately. Else, you can consider the project to be "closed".

Once the project is officially closed, there are a number of things you can do to learn from the project:

- Recognize the effort of all team members, especially exceptional performers
- Terminate any outside contractors or freelancers
- Organize work events to thank all team members for their efforts and sacrifice

- Conduct a post-mortem to identify all positives and negatives from the project
- Make a list of things that can be improved in future projects
- Analyze the project for anything that remained unfinished
- Collect and archive all project documents for future analysis
- Create a final project report - one for yourself and one for the organization
- Make a list of personal learnings from the project and how you can improve your own work

Once you're done with your analysis, you can close the project and take on a new challenge!



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